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Customer relationship management model for SADE Innovations Oy

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Customer relationship management model for SADE Innovations Oy

This thesis examines the development and early implementation of a customer relationship management (CRM) model at SADE Innovations Oy, a Finnish technology company specializing in IoT solutions. The objective was to create a structured CRM approach that enhances internal coordination, improves customer satisfaction, and supports scalable long-term relationship management. The author contributed directly to the CRM deployment and the establishment of customer care practices.

The research applied qualitative methods, using semi-structured interviews with sales and project personnel. Thematic analysis addressed the current CRM state, employee expectations, recognized benefits, implementation challenges, and key performance indicators (KPIs). The study integrates theoretical frameworks from Buttle and Maklan (2015), Payne and Frow (2005; 2017), and Peppers and Rogers (2017).

Findings indicate that while CRM system usage has improved transparency and internal collaboration, full behavioral integration remains incomplete. Interviewees emphasized the need for clearer role definitions, systematic follow-up routines, and process-based KPIs to drive CRM maturity. Barriers such as fragmented practices and resource limitations were also identified. Based on these insights, the thesis offers recommendations for embedding CRM into organizational culture and proposes KPI-driven feedback mechanisms to sustain continuous development.

Keywords:
CRM model, customer relationship management, B2B sales, KPI development

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Asiakkuudenhoitomalli SADE Innovations Oy:lle

Tämä opinnäytetyö tarkastelee asiakkuudenhallintamallin (CRM) kehittämistä ja varhaista käyttöönottoa SADE Innovations Oy:ssä, suomalaisessa IoT-teknologiaan keskittyvässä yrityksessä. Tavoitteena oli rakentaa systemaattinen CRM-malli, joka parantaa sisäistä koordinointia, lisää asiakastyytyväisyyttä ja tukee pitkäaikaisten asiakassuhteiden hallintaa. Tekijä osallistui suoraan CRM-järjestelmän käyttöönottoon ja asiakkuudenhallinnan käytäntöjen luomiseen.

Tutkimuksessa sovellettiin laadullisia menetelmiä, ja aineisto kerättiin puolistrukturoiduilla haastatteluilla myynnin ja asiakasprojektien henkilöstöltä. Teemallinen analyysi käsitteli CRM:n nykytilaa, työntekijöiden odotuksia, havaittuja hyötyjä, käyttöönoton haasteita ja keskeisiä suorituskykymittareita (KPI). Tutkimus pohjautui Buttle ja Maklanin (2015), Payne ja Frow’n (2005; 2017) sekä Peppers ja Rogersin (2017) teoreettisiin viitekehyksiin.

Tulokset osoittavat, että CRM-järjestelmän käyttö on parantanut läpinäkyvyyttä ja sisäistä yhteistyötä, mutta käytännön toimintatapojen täydellinen integrointi on vielä kesken. Haastattelujen perusteella korostui tarve selkeille roolijaolle, systemaattiselle seurannalle ja prosessiperusteisille KPI-mittareille CRM:n kehittämiseksi. Samalla tunnistettiin esteitä, kuten hajanaiset käytännöt ja resurssirajoitteet. Työ esittää suosituksia CRM:n syvällisempään juurruttamiseen organisaatiokulttuuriin sekä avainsuorituspohjaisten (KPI) palautemekanismien hyödyntämiseen jatkuvan kehityksen tukena.

Avainsanat:
CRM-malli, asiakkuudenhallinta, B2B-myynti, avainsuoritusmittarien kehittäminen

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1 Introduction

1.1 Research background and commissioner

Customer satisfaction is a critical success factor in Business-to-Business (B2B) environments, where long-term relationships often form the foundation of a company's revenue. In this context, ensuring customer satisfaction requires a proactive and strategic approach that goes beyond traditional service delivery. Key to this is building trust, understanding the customer's business environment and long-term goals, and continuously offering tailored and value-adding solutions.

One of the most effective tools for supporting long-term customer satisfaction is a well-designed customer relationship management (CRM) model. As defined in Section 2.3, a CRM model refers to a strategic framework that guides how customer relationships are built and maintained over time (Buttle & Maklan, 2015, p. 4). A CRM model allows a company to structure its sales processes, facilitate ongoing dialogue, anticipate client needs, and deliver personalized services. Proactive problem-solving and regular strategic reviews become central practices. CRM systems also play an essential role in consolidating customer information, helping to manage customer relationships holistically, and ensuring critical insights are not overlooked.

SADE Innovations Oy, the commissioner of this thesis, is a Finnish product development company that provides advanced IoT solutions and embedded systems across healthcare, logistics, and industrial sectors. With offices in Turku and Salo, the company employs 29 professionals and reported a revenue of EUR 3.49 million in 2023, reflecting a growth of 36.6% from the previous year. Its core expertise lies in seamlessly integrating embedded systems with cloud services, positioning it as a key player in demanding product development projects. Despite this success, the company's CRM use has remained basic and primarily limited to sales funnel tracking, lacking strategic integration into broader customer care or marketing processes.

Historically, SADE Innovations Oy lacked a systematically implemented customer relationship management (CRM) model. The organization relied on Jira, a platform primarily designed for task tracking rather than strategic customer management. As a result, customer data remained fragmented and inconsistently documented. Typical entries consisted of only company names and vague project descriptions. Core CRM model components, such as contact history, segmentation, or follow-up routines, were missing, which constrained the company's ability to conduct structured relationship development or derive strategic insights (Buttle & Maklan, 2015, p. 23).

In early 2025, a targeted sales taskforce was assembled to reconnect with customers who had not been contacted for years. This effort led to multiple new deals and demonstrated the value of reactivating existing client relationships, a practice often more cost-effective than acquiring new customers (Payne & Frow, 2005). At that time, sales activities were mostly decentralized, with each representative managing their own customer portfolio. No common routines were in place for conducting annual reviews or structured follow-up after lost deals or deferrals, leading to inefficiencies and missed commercial opportunities.

To address these shortcomings, SADE Innovations initiated a CRM system implementation in early 2025 in parallel with the development of a formal CRM model. The new system improved visibility into lead tracking, opportunity stages, and pipeline forecasts. This enabled leadership to monitor sales performance more effectively, increasing organizational transparency and planning capacity

As the Sales Developer responsible for initiating the CRM system within the organization, the author has direct experience with both the opportunities and challenges associated with its implementation. This thesis aims to support SADE Innovations in building a systematic and strategic customer relationship management model based on CRM practices. A particular focus is placed on increasing internal understanding of CRM benefits and engaging the company's leadership in the model's implementation and development.

In this thesis, the term CRM model is used to describe a structured managerial framework that outlines how customer relationships are developed and maintained through coordinated processes. The model is not limited to technical tools or software, but represents a strategic-operational approach that connects customer relationship objectives with the everyday practices of sales and customer interaction (Buttle & Maklan, 2015, p. 4). This concept is distinct from a CRM system, which refers to the technological platform used to manage customer data, automate communication, and support day-to-day operations. It is also broader than a general CRM strategy, which may reflect a high-level intention to focus on customers but lacks defined structures for execution. For conceptual clarity, the thesis consistently applies the term CRM model when referring to the overarching framework under investigation.

1.2 The objective of the thesis and the research questions

The main objective of this thesis is to support the commissioning company, SADE Innovations Oy, in understanding and implementing a structured customer relationship management (CRM) model into its sales operations. The model developed during this thesis is intended to enhance internal sales functions, improve customer care, and foster long-term business relationships. The focus is solely on the CRM model, and the thesis does not cover the company’s overall sales strategy or sales planning.

The research aims to provide practical insights into the current use of CRM and to identify opportunities for developing a systematic customer relationship management model that can be integrated into everyday operations. Emphasis is also placed on demonstrating the value of CRM to company leadership and increasing their engagement in its strategic use.

The research is guided by the following questions:

- What is the current state of the CRM model within the commissioner organization?

- What are the expectations for the CRM model among employees involved in sales?
- What are the benefits of utilizing a CRM system?
- What are the challenges to successful implementation?
- What Key Performance Indicators (KPIs) can the CRM model provide?
- Which KPIs generate the most value for sales and management?

1.3 Research methods, data collection and analysis

This thesis adopts a qualitative research approach. Data was collected through semi-structured interviews, internal documentation analysis, and process observations within the case company. Interview participants were selected based on their involvement in sales and customer project management at SADE Innovations, ensuring that they had relevant experience with CRM practices. All participants agreed to take part in the study, and the interviews resulted in insightful discussions on the current CRM model and its potential.

In total, six employees of the commissioning company were interviewed, representing various roles in sales, customer project work, and management. The interviews were conducted in April 2025, and the data was supported by reviewing the existing CRM documentation and usage processes. The current state of CRM utilization was described and analyzed in relation to academic theory. In addition, the study reviewed existing literature on CRM-related Key Performance Indicators, and based on both theory and interview insights, a set of relevant KPIs was proposed for use within SADE Innovations Oy.

2 CRM models as a conceptual framework

2.1 Origin and development of CRM models

The concept of Customer Relationship Management (CRM) has evolved from relationship marketing into a comprehensive strategic approach that spans organizational boundaries (Buttle & Maklan, 2015, p. 7). Its origins trace back to the 1980s, when relationship marketing gained traction as firms shifted away from short-term, transaction-oriented strategies toward fostering long-term customer engagement (Payne & Frow, 2005). This transition was driven by the growing awareness that customer retention generates significantly higher profitability than constant acquisition (Reichheld & Sasser, 1990). During this period, satisfaction and loyalty became central concepts in marketing practice, with trust and commitment forming the theoretical foundation for lasting customer relationships (Morgan & Hunt, 1994). These relationship marketing principles later laid the groundwork for modern CRM models (Payne & Frow, 2005; Buttle & Maklan, 2015).

By the 1990s, advancements in database technologies and enterprise software enabled organizations to collect and analyze customer data on a large scale (Buttle & Maklan, 2015, pp. 45–46). This development marked a shift from intuition-based marketing to data-driven decision-making and laid the foundation for CRM as a functional business system (Payne & Frow, 2005). Organizations began using customer databases to identify behavioral patterns, segment markets, and tailor communications. Analytical CRM emerged as a key tool, offering insights into customer profitability, loyalty, and preferences (Buttle & Maklan, 2015, pp. 47–49). At the same time, operational CRM systems were introduced to automate and manage daily customer interactions such as order processing, complaint resolution, and service coordination (Buttle & Maklan, 2015, p. 43). These innovations enabled companies to scale CRM systems according to business needs while delivering more personalized and efficient customer experiences.

In the early 2000s, thought leaders such as Payne and Frow (2005) advanced the understanding of CRM by framing it as a strategic business process rather than just a set of tools. Their framework emphasized aligning CRM initiatives with organizational goals, integrating CRM across departments, and using data to create customer value. They also introduced the Five Process Model, which includes strategy development, value creation, multichannel integration, information management, and performance assessment. At the same time, Buttle and Maklan (2015, p.21) reinforced the view of CRM as a philosophy, an organizational mindset that places customers at the core of every business decision. This broader perspective helped organizations see CRM as a long-term investment in competitiveness and customer value, rather than just a sales utility.

With the emergence of cloud computing in the 2010s, CRM systems became more accessible, scalable, and cost-effective for organizations of all sizes. Cloud-based platforms such as Salesforce and Microsoft Dynamics enabled real-time collaboration across departments, mobile access to customer information, and seamless integration with existing business applications (Buttle & Maklan, 2015, pp. 84–86; Salesforce, 2023). These innovations significantly lowered the technological and financial barriers to CRM adoption, particularly for small and medium-sized enterprises. Moreover, CRM systems began offering modular functionalities tailored to specific industries, including B2B services, retail, and e-commerce, allowing organizations to configure solutions to match their operational needs (Gartner, 2023). As a result, CRM evolved from a static repository of customer data into a dynamic platform for managing sales pipelines, marketing campaigns, and end-to-end customer journeys.

In recent years, CRM development has entered a new phase shaped by artificial intelligence (AI) and automation technologies. AI-powered systems can now predict customer needs, generate next-best action suggestions, and support real-time sales coaching through data analysis (Salesforce, 2023). Large language models (LLMs), such as OpenAI’s GPT, are increasingly used

to summarize customer conversations, draft personalized responses, and analyze sentiment across channels. These capabilities are transforming CRM from a reactive tool to a proactive system that anticipates behavior and optimizes customer journeys. As Chatterjee et al. (2019) note, successful AI–CRM integration requires not only advanced tools, but also organizational readiness to manage data quality, internal collaboration, and process alignment. In complex B2B environments, where relationships are long-term and involve multiple stakeholders, such predictive capabilities offer strategic advantages in maintaining continuity and deepening engagement.

CRM's evolution also reflects changing business priorities, where customer-centricity has become a strategic imperative. Modern CRM models are deeply embedded in organizational strategy, supporting account-based marketing, customer success initiatives, and cross-functional collaboration (Buttle & Maklan, 2015, pp. 26–27). As Payne and Frow (2013, p. 30) emphasize, CRM is not merely a technology but a customer-centric strategy that aligns people, processes, and systems to create long-term value. In complex B2B environments like SADE Innovations Oy, CRM serves not only to track sales activities but also to coordinate communication between engineering, sales, and support teams. This ensures that the entire organization shares a unified understanding of customer needs and status. As Chatterjee et al. (2019, p. 147) point out, such integration is crucial for maximizing CRM effectiveness. Thus, CRM has shifted from a back-office tool to a central pillar of strategic customer management, reinforcing the importance of internal alignment in delivering scalable and consistent customer value.

Customer Relationship Management (CRM) systems are widely used to support organizations in managing customer data, streamlining interactions, and improving service quality. However, their true value emerges only when aligned with a strategic CRM model, a structured framework that defines how customer relationships are developed and maintained across the organization (Buttle & Maklan, 2015; Payne & Frow, 2013, p.30).

CRM systems provide the technological foundation for executing customer-related processes. They centralize contact information, record interaction histories, automate sales workflows, and generate analytics to support decision-making (Salesforce, 2023). In B2B environments, where customer relationships are often long-term, complex, and multi-stakeholder, CRM systems are particularly valuable for ensuring continuity, coordination, and visibility across departments (Payne & Frow, 2005).

However, as Peppers and Rogers (2017, p. 24) emphasize, CRM systems alone do not build relationships, they facilitate the processes defined by a customer relationship model. Without a CRM model in place, system usage tends to be fragmented and tactical, often limited to sales or administrative functions. The CRM model, in turn, provides a strategic context: who is responsible for what, how often customers should be contacted, how accounts are prioritized, and how customer value is measured (Buttle & Maklan, 2015, pp. 20-22). For example, the CRM model might define that strategic accounts must receive quarterly review meetings involving both sales and engineering teams. The CRM system is then used to track these meetings, store notes, assign follow-up tasks, and alert stakeholders when interactions are due.

Customer data plays a crucial role in the implementation of a successful CRM model. Understanding the customer's history, preferences, and behavioral patterns allows organizations to offer personalized and timely experiences throughout the entire customer lifecycle. Modern CRM systems support this by enabling real-time data utilization and predictive analytics, which help organizations anticipate needs and suggest relevant solutions. As Hänti (2021, p. 70) notes, even real-time use of customer data makes it possible to create meaningful insights that help customers succeed in what they are trying to achieve. This shift from reactive to proactive customer management strengthens the organization’s ability to position itself as a trusted partner. Moreover, recognizing the long-term value of customer relationships, often measured through Customer Lifetime Value (CLV), encourages companies to

invest in systems and routines that prioritize retention, satisfaction, and growth, rather than short-term transactions.

Kotler and Keller (2016) further highlight that CRM systems support lifecycle management, helping organizations guide customers from initial contact to loyalty. They allow real-time monitoring of customer journeys and enable segmentation, upselling, and churn prevention activities, provided that these processes are clearly defined within the CRM model. According to Gartner (2023), CRM platforms are increasingly embedded in digital transformation strategies**.** Their capabilities now include artificial intelligence (AI), predictive analytics, and integration with cloud-based tools, which support not only automation but proactive customer engagement**.** However, Gartner (2023) also warns that without a guiding model, the strategic potential of CRM remains underutilized.

In the context of SADE Innovations Oy, CRM system use is expanding beyond sales administration into broader customer management. Yet, the system's effectiveness depends on the emergence of a formalized CRM model, one that sets common standards, processes, and expectations across business units. This ensures that client relationships are managed not ad hoc but systematically, with strategic intent. In summary, CRM systems are essential operational enablers, but they reach their full potential only when guided by a well-defined CRM model. Together, they ensure that organizations are not merely collecting data but using it to build trust, drive value, and strengthen customer relationships over time.

2.2 Common CRM models and their distinctions

Several theoretical CRM models have been developed to support organizations in implementing relationship-oriented management practices. These models serve as strategic and operational frameworks that help embed customer-centric thinking across departments and processes. Each model offers a distinct perspective on how customer relationships should be

managed, varying in theoretical foundations, primary focus areas, and applicability depending on organizational needs and market environments (Buttle & Maklan, 2015).

The IDIC Model, developed by Peppers and Rogers (2017), is based on the principles of one-to-one marketing. It consists of four sequential steps: Identify, Differentiate, Interact, and Customize. The model emphasizes personalized communication and is especially useful in B2C or service-intensive environments where tailoring the customer experience is key. Its main strength lies in fostering loyalty through customized interactions based on individual customer data.

In contrast, the CRM Value Chain Model, proposed by Buttle and further developed with Maklan (Buttle & Maklan, 2015), concentrates on the internal capabilities and processes necessary for effective CRM execution. The model comprises five primary stages: customer portfolio analysis, customer intimacy, network development, value proposition development, and relationship lifecycle management. These are supported by four enabling conditions, leadership, IT, people, and processes, that ensure alignment with organizational goals. The model starts with customer portfolio analysis and progresses through network and value proposition development, concluding with performance monitoring. It is particularly applicable to large organizations where process efficiency, internal coordination, and strategic resource alignment are essential. The CRM Value Chain ensures that customer strategies are translated into actionable processes supported by a robust organizational infrastructure. (Buttle & Maklan, 2015, pp. 20, 142–143.)

The Five Process Model, introduced by Payne and Frow (2005), adopts a strategic and cross-functional approach to CRM. It incorporates five interrelated processes: strategy development, value creation, multichannel integration, information management, and performance assessment. This model is well suited for complex B2B environments where CRM must align with strategic goals, support consultative selling, and facilitate collaboration across departments. Payne and Frow (2017) argue that this integrated model

enhances customer value by connecting organizational vision with daily operations.

A comparative overview of the IDIC Model, CRM Value Chain, and the Five Process Model is presented in Table 1, highlighting key differences in their focus areas, strengths, and contextual suitability. The table has been compiled by the author based on the reviewed sources.

Table 1. Comparative summary of CRM models

Model	Focus	Strengths	Best Fit / Use Case
IDIC Model (Peppers & Rogers, 2017)	Personalized customer engagement	Tailored communication and loyalty building	B2C, service sectors
CRM Value Chain (Buttle & Maklan, 2015)	Internal processes and structure	Operational clarity, resource efficiency	Large enterprises, complex processes
Five Process Model (Payne & Frow, 2005)	Strategic integration and planning	Enterprise-wide alignment and scalability	B2B firms, cross-functional CRM

Although each model offers a unique lens for designing CRM practices, they are not mutually exclusive. Organizations often develop hybrid frameworks that draw on elements from multiple models to meet their specific requirements. For example, a company might apply the personalization logic of the IDIC model (Buttle & Maklan, 2015) to its marketing efforts, while leveraging the CRM Value Chain (Payne & Frow, 2005) to improve process efficiency and adopting Payne and Frow’s strategic integration for cross-functional alignment. The effectiveness of any CRM model ultimately depends

on how well it is adapted to the company’s strategic goals, culture, and customer base.

2.3 Definition and key elements of a CRM model

At the heart of any effective CRM model is the ability to create and deliver value to customers. Companies must go beyond transactional efficiency and strive to understand their customers' true needs. As Kotler, Pfoertsch, and Sponholz (2021, p. 29) emphasize, organizations must be capable of producing genuinely meaningful and value-generating services for their clients. This perspective shifts the focus of CRM from internal processes to external impact, from managing relationships to enabling customer success. A well-designed CRM model therefore acts not only as a control mechanism but as a strategic tool for co-creating value with customers. One of the early definitions of CRM describes it as the process of “identifying a company’s best customers and maximising the value from them by satisfying and retaining them” (Kennedy, 2006, p. 58). This perspective frames CRM as a value-driven philosophy, emphasizing retention and satisfaction rather than mere operational efficiency.

A Customer Relationship Management (CRM) model can be defined as a structured framework that outlines how an organization initiates, maintains, and develops relationships with its customers. Rather than being limited to software or technical tools, a CRM model represents a broader managerial philosophy that connects organizational strategy with operational processes aimed at maximizing long-term customer value (Buttle & Maklan, 2015, p. 4).

According to Buttle and Maklan (2015), CRM models are composed of interrelated elements that ensure the systematic handling of customer interactions across different departments. These elements enable companies to move from reactive and fragmented customer care to coordinated and proactive engagement. In B2B (Business to Business) settings, where relationships often span multiple years and involve several stakeholders, such

structure is essential for ensuring consistency, transparency, and accountability.

Key elements of a CRM model typically include following (Buttle & Maklan, 2015, pp. 4, 20, 142–143):

- Customer segmentation and profiling: Categorizing customers based on strategic importance, behavioral patterns, industry, revenue potential, or other criteria. This supports the allocation of resources and customization of services according to customer value.
- Relationship planning: Defining the scope, frequency, and nature of customer interactions. This includes scheduled check-ins, performance reviews, and collaborative development planning, particularly relevant in project-based or consultative selling contexts.
- Customer lifecycle management: Structuring activities according to different stages of the customer journey, from acquisition and onboarding to retention and growth. This also includes mechanisms for identifying at-risk customers and re-engagement strategies.
- Information systems integration: Utilizing CRM software and related digital tools to support the centralization of customer data, documentation of interactions, and sharing of information across departments. The system must enable visibility and accountability.
- Performance measurement: Developing and monitoring key performance indicators (KPIs) that reflect the success of the CRM model. These may include process adherence metrics like contact frequency outcome-based indicators like retention and collaboration indices.

A well-functioning CRM model aligns customer-related processes with the company’s broader strategic goals (Buttle & Maklan, 2015, pp. 20–21). It fosters consistency in communication, reinforces brand identity, and helps teams deliver personalized, value-driven service (Kotler et al., 2020, pp. 148–149). Furthermore, the model ensures that roles and responsibilities are clearly defined, enabling employees across functions to contribute

meaningfully to customer satisfaction and business development (Lambert, 2010, p. 5). In practice, the success of a CRM model is contingent on cultural alignment and leadership support. It must be continuously evaluated and refined based on feedback, performance data, and changing customer expectations (Buttle & Maklan, 2015, pp. 21–22, 143).

Customer interactions are influenced not only by the immediate sales situation but also by the internal environment of the company. As Hänti (2021, p. 53-55) points out, new ideas may emerge from customer encounters in the form of indirect signals or weak indications of change. These are often linked to broader market disruptions, internal development needs, or future goals of the customer. Recognizing such signals requires not only listening during direct interaction, but also internal systems and culture that support shared interpretation and proactive response. A structured CRM model helps define these internal conditions so that relevant insights are not lost. Without common goals, shared responsibility, or cross-functional communication, potential innovations may remain unused or be dismissed too early due to short-term thinking.

In addition to process alignment and information systems, the human element of relationship building remains vital in CRM. Kumar and Reinartz (2018, pp. 20–21) highlight that enduring customer relationships are built upon mutual trust, commitment, and the delivery of long-term value. These relational qualities transform CRM from a transactional tool into a strategic enabler of customer-centric growth. This perspective broadens the scope of CRM beyond automation and data integration, emphasizing the importance of sustained human engagement across the customer lifecycle (Kumar & Reinartz, 2018, pp. 20–21).

Although traditionally associated with marketing, the logic of customer relationship management extends to all organizational roles that interact with customers. As Kotler, Pfoertsch, and Sponholz (2021, p. 29) argue, marketing must return to its human-centered roots by co-creating meaningful value with customers through direct contact and mutual understanding. In B2B context,

this principle must be applied not only within marketing, but equally in sales, project management, and service functions. Therefore, strategic CRM models should promote an organization-wide mindset where all customer-facing roles actively contribute to relationship-building and long-term value creation.

2.4 Benefits of a structured customer care model

Structured customer care models are designed to increase customer retention and optimize relationship profitability. These models not only support service consistency and customer satisfaction but also reduce unnecessary operational inefficiencies. The highest costs to the company in managing a customer relationship are typically incurred at the beginning of the customer lifecycle. These include expenses related to customer acquisition, onboarding, and initial setup, which often outweigh the costs of maintaining ongoing relationships (McDonald & Wilson, 2015, p. 423). For this reason, CRM models that emphasize customer lifecycle thinking, and particularly the strategic nurturing of established customer relationships, are critical in improving overall profitability.

Acquiring new customers is significantly more expensive than retaining existing ones. According to Mooradian, Matzler and Ring (2014, p. 279), attracting a new customer can cost five to seven times more than keeping an existing one. This economic disparity emphasizes the strategic importance of structured customer relationship management models that prioritize retention, satisfaction, and long-term value. Focusing on existing customer relationships not only lowers acquisition costs but also enhances customer lifetime value and fosters stronger loyalty, which are critical for sustainable business growth.

Implementing a customer care model based on CRM principles brings numerous strategic and operational benefits. Payne and Frow (2017) emphasize that such models improve customer retention, increase cross-selling opportunities, and foster loyalty. A well-implemented CRM model also enhances organizational transparency and accountability, facilitates internal

communication, and supports predictive service and sales strategies. In B2B environments, where purchasing decisions are complex and involve multiple stakeholders, structured customer care enables better planning, improved customer understanding, and higher satisfaction rates. Furthermore, CRM systems provide a centralized platform that enhances data accuracy and accessibility across departments, leading to more informed and agile decision-making.

2.5 Challenges in CRM implementation

The implementation of a customer relationship management model (CRM model) in an organization involves multidimensional challenges that extend beyond the deployment of CRM software. Whereas CRM systems focus primarily on the collection and organization of customer data, a CRM model entails a strategic framework for managing customer relationships across the organization. This includes processes, roles, contact planning, and customer segmentation. As such, the introduction of a CRM model demands organizational commitment, behavioural change, and cross-functional integration (Buttle & Maklan, 2015).

A central challenge in CRM model implementation is ensuring organizational alignment. Different departments, such as sales, engineering, and project management, often hold divergent views of the customer relationship. Consequently, the creation of a unified CRM model may be met with resistance or partial adoption. This fragmentation reduces the model's effectiveness and may reinforce siloed behaviour, particularly in business-to-business (B2B) contexts, where customer engagements span multiple functions and touchpoints (Buttle & Maklan, 2015, pp. 21–22).

Leadership commitment and role clarity are equally critical. Without clear ownership of the CRM model, responsibility for its execution may remain undefined. Senior leadership must articulate the model's strategic relevance and ensure that it is embedded in performance reviews, client planning cycles,

and key account processes (Buttle & Maklan, 2015, p. 143). According to Gartner (2023), CRM initiatives are more likely to succeed when they are championed by executives and integrated into decision-making structures.

Another common challenge is resistance to behavioral change. Employees accustomed to informal or reactive customer management may perceive the CRM model as bureaucratic or overly prescriptive. In these cases, adoption tends to remain superficial, with CRM tools used inconsistently and care models left unimplemented. However, as Hänti (2021, p. 9) emphasizes, adopting a customer-driven operating model is not optional but a necessary response to changing customer behavior. It requires proactive organizational commitment and agility across all levels to overcome resistance and embed structured customer practices into everyday operations.

Moreover, the lack of actionable metrics undermines the model's impact. Without clearly defined performance indicators, such as contact frequency adherence, strategic account plan coverage, or relationship tier compliance, organizations struggle to assess the model’s actual use. This can lead to a situation where the CRM model exists in theory but is not practiced systematically. Effective implementation therefore requires KPI development aligned with customer strategy and regular monitoring of usage Buttle & Maklan. (2015, pp. 142–143.)

Lastly, organizations often underestimate the time and resources required to transition from an ad hoc relationship approach to a formalized CRM model. Developing process documentation, training personnel, and cultivating a customer-focused culture are all essential steps that demand sustained effort. To avoid model erosion, companies must invest in reinforcement mechanisms such as internal audits, coaching, and leadership feedback loops (Buttle & Maklan, 2015).

While CRM offers clear advantages in personalization, automation and long-term customer management, its misuse can lead to unintended consequences. Nguyen and Mutum (2012) warn that excessive reliance on

data collection and individualized targeting may result in customer mistrust, especially if the perceived exchange becomes one-sided or invasive. Their review highlights that CRM, when poorly implemented, can be seen as a value-extraction tool rather than a relational framework. If customers begin to feel exploited rather than empowered, the entire CRM scheme may backfire, reducing both loyalty and long-term profitability. This concern calls for greater attention to fairness, transparency, and the dual creation of value, where both firm and customer perceive mutual benefit, as a foundation of CRM strategy.

In conclusion, the successful implementation of a CRM model depends not only on technical enablers but also on strategic leadership, cultural readiness, and measurable outcomes. Recognizing and addressing these organizational challenges is vital for building a CRM capability that supports long-term customer value creation.

2.6 CRM in the era of digital transformation

Kurvinen and Seppä (2016, p. 119) emphasize that in marketing automation, systems operate based on predefined rules and logic set by human experts. The benefits gained from such systems depend on the strategic input and effort of human operators. This view reflects a time when all content and communication logic in CRM workflows were primarily designed and produced by people. However, the digital transformation of CRM has fundamentally altered this dynamic. Modern CRM solutions now rely on real-time analytics, cloud infrastructure, and integrated platforms. A particularly disruptive element has been the emergence of artificial intelligence (AI), and more specifically large language models (LLMs), such as OpenAI’s GPT. These technologies are capable of generating marketing content, chatbot scripts, segmentation messages, and even sales outreach drafts, tasks that were previously reserved for human experts.

In this new context, the role of human actors within the CRM model is evolving. While strategic direction and ethical oversight remain core human

responsibilities, LLMs can now assist or even lead in content production and data interpretation. Humans shift from being the sole creators of communication to becoming curators and orchestrators of AI-supported interaction. Consequently, organizations must adapt their CRM models to incorporate AI governance, prompt engineering skills, and cross-functional AI integration practices. In B2B contexts, LLMs provide specific enhancements to CRM functions. They enable sales and customer care teams to:

- Scan public and proprietary data to detect customer needs
- Draft tailored proposals or responses for key decision-makers
- Analyze interaction histories for strategic follow-up opportunities. (Chatterjee et al., 2019, p. 147.)

These capabilities transform CRM systems from static repositories into proactive, intelligent assistants that strengthen decision-making and deepen customer relationships.

One significant advancement in AI-enhanced CRM systems is the use of natural language processing (NLP). NLP enables computers to interpret and generate human language, allowing CRM systems to support automated communication, chatbots, and analysis of customer feedback. This improves efficiency and consistency in customer interaction while enabling insight extraction from unstructured data such as emails or social media. In B2B settings, NLP helps decode complex conversations, enabling sales and service personnel to tailor communication and understand customer sentiment. However, successful implementation requires quality data and readiness to act on system-generated insights (Ahmad & Pande, 2024).

Recent empirical studies demonstrate that AI-enhanced CRM systems strengthen several organizational capabilities, including customer management, relationship upgrading, and win-back potential (Yoo et al., 2024). These capabilities correspond directly with CRM model components. For instance, NLP-powered interaction tracking and automated service responses enhance relationship planning and lifecycle management. AI-driven

segmentation and personalization strengthen customer profiling, while task automation and multilingual content generation contribute to information system integration and communication consistency. Notably, predictive analytics and lead scoring improve sales forecasting and customer targeting. However, the study also highlights that technological potential alone does not guarantee performance gains; success depends on organizational readiness and the strategic alignment of AI features with CRM objectives

While technical capabilities such as NLP and automation enhance CRM performance, long-term customer value in B2B settings is still strongly shaped by relational factors. Graca, Barry, and Doney (2015) emphasize that behavioral attributes, such as trust, openness, and mutual commitment, have a significant impact on performance outcomes in buyer–supplier relationships. These dimensions are particularly relevant when AI-CRM systems are used to personalize interactions and support continuity in complex customer relationships. Their findings reinforce the view that CRM is not only about data processing but also about fostering relationship capital that drives measurable business outcomes.

A systematic literature review by Hartanto et al. (2025) confirms that AI integration significantly improves CRM system effectiveness by enhancing personalization, automating service processes, and enabling more accurate decision-making. These improvements directly support key CRM model components, including customer segmentation, relationship planning, and performance monitoring. However, Hartanto et al. (2025) emphasizes that realizing these benefits requires more than technical implementation. Organizational readiness, cultural alignment, and role clarity between humans and AI are critical success factors. Without a shared understanding of the purpose and limitations of AI in CRM, companies risk underutilizing its potential or misaligning it with strategic goals (Hartanto et al., 2025).

Recent developments in AI-powered CRM systems suggest a fundamental shift in how customer relationships are managed. Rather than relying solely on human-planned sequences and static data, modern systems use model-driven

architectures where enriched customer data is continuously processed through predictive machine learning models. This allows CRM platforms to anticipate customer churn, segment behavior dynamically, and automate personalized actions based on probability scoring. The overall CRM logic thus evolves from reactive recordkeeping to a proactive, insight-driven strategy where decision-making is increasingly assisted by algorithmic forecasting and automated workflows (European Patent Office, 2025).

In AI-driven environments, CRM is undergoing a fundamental transformation, from a reactive toolset to a proactive, self-learning system. Rather than merely tracking past interactions, advanced CRM platforms now anticipate customer behavior through continuous pattern recognition and automated decision support. Murta and Santos (2025) highlight how organizations leveraging AI in CRM shift toward real-time engagement, where customer data is analyzed dynamically and used to guide responses, recommendations, and outreach. This evolution enables not only faster service but also deeper personalization, as machine learning models refine their output based on each new interaction.

The transformation of CRM into a predictive, AI-augmented capability is not just theoretical, it is increasingly relevant for firms like SADE Innovations Oy, whose customer relationships are long-term, consultative, and driven by technology. In this context, CRM must go beyond pipeline tracking and support dynamic, personalized interactions that evolve with the customer’s lifecycle. The following chapter outlines a CRM model designed specifically for SADE’s operating environment, integrating these digital imperatives into practical structure and process.

2.7 Differences between CRM and customer care models

In strategic customer management, it is essential to distinguish between a CRM model and a customer care model, as they represent two complementary but distinct layers of relationship management. Both aim to

improve customer value and long-term loyalty, yet they operate at different scopes and serve different purposes within an organization.

A CRM model is a broad, strategic framework that defines how the organization manages customer relationships. It includes key components such as segmentation logic, value proposition strategies, multichannel integration, performance measurement, and cross-functional collaboration (Payne & Frow, 2005; Buttle & Maklan, 2015). The CRM model answers questions such as:

- How do we segment and prioritize customers?
- What is our organization-wide approach to managing relationships?
- How are CRM systems and data analytics used to support strategy? (Payne & Frow, 2005; Buttle & Maklan, 2015.)

By contrast, a customer care model is more operational and focused on execution. It defines the practical actions and rhythms by which customer relationships are maintained, typically on an account or customer tier level. It includes contact policies, responsibilities for relationship owners, service level definitions, and escalation routines. The customer care model ensures that:

- Strategic customers are contacted regularly and proactively
- Relationship responsibilities are clearly assigned
- Customers receive service levels aligned with their value and needs. (Zendesk, 2024.)

In essence, the CRM model creates the strategic backbone, while the customer care model operationalizes that strategy in day-to-day interactions. The CRM model is concerned with designing the system, and the customer care model is about ensuring consistent execution (Payne & Frow, 2005; Buttle & Maklan, 2015; Zendesk, 2024). To clarify the distinction between these two complementary models, Table 2. presents a comparative overview of their respective focus areas, structures, and intended outcomes.

Table 2. Comparison of CRM model and Customer Care Model

Aspect	CRM model	Customer Care Model
Focus	Strategic framework for customer relationship management	Operational execution of customer interaction and follow-up
Scope	Organization-wide, often cross-functional	Customer- or segment-specific
Elements	Segmentation, value creation, analytics, multichannel strategy	Contact rhythm, ownership, service levels, account plans
Objective	Align strategy, data, and process to customer-centric goals	Deliver consistent and high-quality relationship care
Output	Company-wide CRM strategy, model documentation	Practical care instructions and responsibilities per customer

In the context of SADE Innovations Oy, the CRM model may define which customers are considered strategic, how they are segmented, and how performance is measured across accounts. Meanwhile, the customer care model would specify how often each strategic client is contacted, by whom, and in what format (e.g., quarterly business review, offer follow-up, or customer satisfaction check-in). Ultimately, the CRM model sets the strategic direction, while the customer care model ensures operational discipline. For a company to be customer-centric, these models must be aligned, clearly communicated, and supported by appropriate systems and culture (Hänti, 2021, pp. 107–108).

2.8 Key Performance Indicators for CRM models

While traditional CRM systems provide metrics to monitor sales efficiency and customer satisfaction, a well-structured customer relationship management

model (CRM model) requires specific performance indicators that measure how effectively the organization follows its defined processes. These CRM model KPIs assess internal implementation quality, consistency, and strategic alignment rather than external sales outcomes alone (Buttle & Maklan, 2015; Hänti, 2021, p. 215).

CRM model KPIs focus on how systematically and purposefully the organization manages its customer relationships based on the agreed care model. This approach is particularly useful in B2B settings, where customer interactions are complex and long-term by nature (Payne & Frow, 2017). Instead of only tracking conversions or churn, CRM model KPIs examine the execution of structured relationship development and internal commitment to customer management processes (Buttle & Maklan, 2015; Payne & Frow, 2017).

Common CRM model KPIs include:

- Contact Frequency Compliance – whether contact intervals (e.g., quarterly reviews) defined in the care model are met
- Strategic Account Plan Coverage – share of prioritized customers with documented account development plans
- CRM Utilization Rate – level of activity and engagement across different roles (e.g., sales, engineers, project managers)
- Follow-Up Completion Rate – how well agreed action points from meetings are executed and logged
- Customer Tier Adherence – alignment of provided service level with customer segmentation criteria
- Cross-Functional Participation – degree of collaboration across departments in CRM-related activities. (Buttle & Maklan, 2015; Payne & Frow, 2005.)

These metrics are adapted from CRM literature that emphasizes behavioral implementation over numerical sales targets (Buttle & Maklan, 2015; Payne & Frow, 2005).

Unlike basic CRM dashboards, these KPIs provide feedback on organizational culture and internal process adherence. When used regularly in team evaluations or management reviews, they support continuous improvement in customer operations. As Hänti (2021, p. 51) highlights, true customer-centricity is achieved only when customer care becomes embedded into everyday routines, not just into sales tools.

2.9 Theoretical approaches applied in this study

This theoretical section has focused on the concept of the Customer Relationship Management (CRM) model as a strategic framework for managing customer relationships, particularly in B2B environments. Unlike CRM systems, which provide the technical infrastructure, a CRM model defines how an organization segments customers, plans interactions, aligns internal roles, and measures relationship performance over time (Buttle & Maklan, 2015; Payne & Frow, 2017).

The CRM model guides the entire organization in building systematic and value-driven relationships, ensuring consistency across departments such as sales, engineering, and customer service. Its success depends not only on tools but also on leadership commitment, clearly defined processes, and internal adoption. As Hänti (2021, p. 74) points out, it is no longer sufficient to focus solely on product or service development – organizations must also examine and redesign the ways they interact and collaborate with customers. This shift requires a change in mindset: from internal efficiency to viewing the organization with the “customer-facing side out.”

In SADE Innovations Oy, a customer care model is being introduced to improve systematic management of client relationships. CRM model KPIs are valuable tools to ensure that both sales and engineering personnel use CRM actively and that high-value customers receive planned, proactive attention. For instance, if only the Sales Director uses CRM consistently, the care model has not yet reached the desired maturity.

Looking ahead, artificial intelligence (AI) and large language models (LLMs) offer powerful new tools to enhance CRM models. These technologies can automate repetitive tasks, analyse interaction patterns, and support proactive relationship planning. In B2B settings, this means smarter account management, more relevant customer contact, and faster response to emerging needs. In summary, the future of CRM models lies in their ability to combine structured relationship logic with intelligent, adaptive technology. Organizations that integrate LLMs into their CRM models will gain better insights, improve internal coordination, and deliver more personalized customer experiences at scale.

3 Research methodology

3.1 Research method

This thesis adopts a qualitative research approach to examine the current state, expectations, and development opportunities related to the CRM model within the commissioner organization. Qualitative research is considered suitable when the goal is to understand context-specific practices and human experiences in complex organizational settings. This approach is particularly effective in capturing nuanced insights and identifying recurring themes in participant perspectives (Saunders, Lewis, & Thornhill, 2019, pp. 179–180).

The primary data were collected through semi-structured interviews. This method combines a predefined set of guiding questions with the flexibility to explore topics more deeply depending on participant responses. According to Biddix (2018, p. 87), semi-structured interviews provide both consistency and adaptability, making them especially suitable for studying organizational phenomena. All interviews were conducted by the author either in person or remotely via Microsoft Teams. Details of the interview process and participant selection are discussed in the following section.

3.2 Data collection

The interviewees were selected based on their involvement in sales or customer project management and their familiarity with CRM processes in SADE Innovations. The aim was to ensure that the participants could provide relevant and practice-based insights into how CRM is understood and applied within the organization. Although nearly all employees at the company engage with customers in some capacity, due to its project-based operating model, the interviews were intentionally limited to individuals who have a central role in sales activities or who actively use the CRM system in their daily work. This approach was adopted to focus the data collection on those roles most directly

responsible for managing customer relationships and applying CRM-related practices. By concentrating on these key users and decision-makers, the study aimed to capture the most relevant observations for evaluating the CRM model and identifying opportunities for its further development. Table 3 presents each participant's position, CRM experience, and the rationale for their inclusion in the study.

Table 3. Interviewees' position, CRM experience, and reason for selection.

Person	Position	CRM Experience	Reason for selection
A	Sales Manager, Board Member	Yes, 2 months	Overall perspective on sales and processes; also a board member
B	CEO	Yes, ~2 months	Strategic oversight, involved in sales planning and financial forecasting
C	CTO, CFO, COB, Lead Engineer	Yes, ~2.5 months	Deep involvement in sales, technical leadership and decision-making on processes
D	Marketing Manager, Public Tendering Specialist	Yes, ~2.5 months	Marketing and public procurement responsibility, interfaces with sales
E	Lead Engineer, Board Member	Yes, ~2.5 months	Leads technical customer projects, participates in offer preparation, board member

F	Lead Engineer	Yes, ~4–6 months	Leads customer projects, engages early in customer interaction and estimation

Evolution of the interview form

The initial version of the interview guide was submitted to the thesis supervisor for review before the data collection phase began. Based on the feedback received, the structure of the guide was revised to improve clarity and alignment with the study's conceptual framework. The updated version divided the questions into two distinct sections. The first part (questions 1–2) focused on the respondent's current use and experience of the CRM system, while the second part (questions 3–6) explored views on the CRM model under development. Section titles were added to increase navigability and to reinforce the distinction between system-level usage and model-level expectations.

This revised version was finalized before the first interview and then refined again after the first data collection session. The final version included an additional open-ended question to gather broader development suggestions. In addition to the revised question structure, the final form also featured a written introduction explaining the purpose of the interview, the conceptual distinction between the CRM system and the CRM model, and the research context. It also included information about data confidentiality, anonymization, and ethical handling of responses in accordance with the research guidelines of Turku University of Applied Sciences.

This structure was used consistently in subsequent interviews. These improvements not only enhanced thematic clarity but also supported role-specific interpretation, allowing participants to reflect on both practical system use and conceptual model expectations. The adaptive development of the guide reflects the iterative nature of qualitative research (Aramo-Immonen &

Seppälä-Kavén, 2025) and contributed to data richness and cross-role comparability. The finalized version of the interview form used in the interviews is included as Appendix 2.

Interview procedure

All participants were contacted personally by the author and informed in advance about the study's purpose and scope. Individual interview times were scheduled based on availability. All interviews were conducted as individual, semi-structured sessions, using a pre-designed thematic interview form as the guiding framework. At the beginning of each session, the background and objectives of the thesis were briefly introduced to the interviewee. In addition, the core concept of the CRM model, defined in this study as a strategic and structured approach to customer relationship management, was outlined to ensure a shared understanding of the discussion context.

Some interviews were conducted face-to-face, while others were held via Microsoft Teams. Due to privacy considerations, interviews were not recorded; instead, detailed written notes were taken. All interviewees represented different roles within SADE Innovations, ensuring a cross-sectional view of the CRM model's use and expectations across sales and project-related functions.

To enhance the transparency and accuracy of responses, a collaborative documentation method was applied. During each interview, the interviewer completed the interview form in real time while sharing the content visually with the interviewee. This allowed the interviewee to observe, verify, and, if necessary, correct the entries as the conversation progressed. In practice, this meant that the answers were not only recorded based on the interviewer's interpretation, but co-validated by the respondent during the session.

This approach strengthened the reliability of the data in two ways. First, it reduced the risk of subjective misinterpretation by enabling immediate feedback from the interviewee. Second, it provided a structured yet open setting where key points could be clarified on the spot. Although the interviews were not audio recorded, the use of simultaneous confirmation effectively

supported data validity. This method resembles the "member checking" principle often recommended in qualitative research to enhance credibility (Creswell & Miller, 2000).

By enabling real-time verification and encouraging mutual understanding, the interview process supported both data depth and consistency. Furthermore, the open structure of the form allowed the interviewer to explore emerging themes beyond the pre-formulated questions whenever relevant, which added qualitative richness to the collected material.

As the author of this thesis has been actively involved in the implementation of CRM systems in three different companies, including the commissioning organization, it is important to acknowledge that the researcher’s background may have influenced both the design of the interview guide and the interpretation of the data. However, every effort was made to maintain a neutral and attentive role during the interviews. Questions were formulated in an open-ended, non-leading manner, and responses were documented using the participants’ own wording whenever possible. The objective was not to validate prior assumptions but to capture each interviewee’s authentic perspective on CRM usage, development needs, and expectations toward the CRM model.

3.3 Data analysis

Thematic analysis was used to structure and interpret the qualitative data collected through semi-structured interviews. The interview content was grouped into six core themes, each corresponding directly to the research questions. These themes were: the current state of CRM usage at SADE Innovations, internal expectations regarding the CRM model, perceived benefits of implementing the model, organizational challenges to effective use, CRM-related Key Performance Indicators (KPIs), and the value of a CRM model and associated KPIs from the commissioner’s perspective. The goal

was to identify recurring views and variations across participants to form a comprehensive understanding of CRM practices within the organization.

As full transcripts were not produced, the analysis relied on the researcher's contemporaneous notes and written summaries of participant responses. According to Biddix (2018), thematic analysis remains a valid approach when systematically applied to categorized narrative data, even in the absence of verbatim transcripts. The analysis process included reviewing the written results repeatedly to identify recurring expressions, grouping similar content into categories, and distilling these into specified themes based on research questions. The documentation of coding logic and internal comparison across participants supported consistency in interpretation.

Thematic analysis of interview data

To analyze the interview data in a structured and research-driven manner, a thematic analysis was conducted. The analytical framework was based on six predefined research questions, each of which served as a thematic category guiding the interpretation of responses. Because the interview guide had been designed directly from these questions, participants’ responses were naturally organized under matching thematic areas. No open coding was required, as the material aligned closely with the structure of the inquiry.

While the framework itself was deductive, the analysis retained flexibility at the content level. Responses were examined for variation in interpretation and emphasis, allowing individual perspectives to emerge within each theme. The researcher revisited the material multiple times to ensure that the selected expressions accurately captured the participants’ intent and to maintain consistency across interviews. To support conceptual depth, relevant theoretical concepts from CRM literature, such as segmentation logic, ownership structures, and multichannel integration, were incorporated into the interpretation. This interplay between empirical data and theoretical reference points contributed to analytical richness and increased the practical relevance

of the findings, as emphasized by Aramo-Immonen and Seppälä-Kavén (2025).

The six thematic categories resulting from this process are presented in Table 4. They reflect the central topics explored during the interviews and serve as the analytical framework for the sections that follow, from 4.2 through 4.7

Table 4. Thematic categories of interviews

Thematic Category (Research Question)	**Example Subthemes / Codes**
1. Current state of CRM usage at SADE Innovations	Usage varies by role; memory-based follow-up; lack of contact history
2. Internal expectations regarding the CRM model	Desire for shared structure; follow-up routines; strategic alignment
3. Perceived benefits of implementing the CRM model	Improved visibility; transparency; pipeline clarity; support for team dialogue
4. Organizational challenges to effective CRM use	Resistance to 'process language'; unclear responsibilities; low documentation habits
5. CRM-related Key Performance Indicators (KPIs)	Desire for follow-up tracking; conversion cycle insights; inactive account alerts
6. Value of the CRM model and associated KPIs for the commissioner	Technical orientation shapes CRM understanding; readiness uneven across departments

These categories form the analytical backbone of the study and link the interview material to the core research questions. The following subsections describe how the thematic structure was built, starting from the reduction of raw expressions, followed by clustering into subthemes, and ending with abstraction into categories based on predefined research questions.

Reduction of Interview Data

As part of the thematic analysis, a reduction phase was conducted to simplify and distill the raw interview material into meaningful expressions. Since the interview guide was structured according to the research questions, participants' responses could be directly reviewed in relation to the corresponding thematic categories. The focus was on identifying CRM-relevant statements and clarifying their content without losing their original intent.

Original responses were reviewed line by line, and non-essential commentary was excluded to maintain focus on key insights. The goal was to retain the tone and message of each expression while simplifying wording for analytical clarity. For example, the original statement "I often track follow-ups in my head instead of using Pipedrive" was simplified to "Memory-based tracking." Likewise, "There's no clear person in charge of the customer after the offer" became "Unclear responsibilities." Another example, "We don't really know which customers haven't been contacted in a while," was shortened to "Lack of follow-up tracking."

These simplified expressions were reviewed for thematic similarity and grouped under research-driven categories. This structured simplification enhanced the transparency of the analysis and ensured that the findings remained grounded in participant perspectives while maintaining a clear alignment with the research questions.

Clustering of reduced expressions

After simplifying the interview responses, the next step was to identify which expressions pointed to the same thematic category defined by the research questions. While the categorization framework was predefined, participants expressed their views in varied ways, making it necessary to assess whether different phrasings referred to the same underlying issue. Some participants spoke directly about missing routines, while others only hinted at them through practical examples. Once grouped under the relevant themes, these connections became clearer.

For instance, the expressions “I track follow-ups in my head” and “CRM is only used when sending offers” were both interpreted as indications of non-integrated CRM use. Similarly, “Nobody really owns the customer after the offer” and “Roles in sales are unclear” were associated with role ambiguity. Expressions like “CRM should remind us if no contact has been made” and “We don’t know who hasn’t been contacted” pointed to a shared need for proactive tracking tools.

In practice, clustering involved comparing simplified responses across interviews and assessing whether they represented common viewpoints within the same research theme. What at first seemed like separate comments often converged into broader conceptual patterns. This step ensured that the variation in individual phrasing did not obscure the underlying consistency of perspectives related to each research question.

Thematic interpretation guided by research questions

The final phase of the analysis involved synthesizing the clustered subthemes under the six predefined thematic categories, each reflecting one of the research questions. This step required stepping back from individual expressions and assessing how each cluster of observations illustrated broader organizational conditions or expectations related to CRM. The aim of this phase was not to generate new categories, but to enhance the clarity and interpretative depth of each predefined theme. The structure allowed the researcher to connect participant responses with conceptual understanding,

and to clarify what each thematic area represents in the context of CRM model development at SADE Innovations. These themes served as the organizing principle for reporting the findings in sections 4.2 to 4.7, ensuring that the results remained explicitly tied to the study's research questions and objectives.

For instance, expressions about unclear customer ownership and lack of defined responsibilities were interpreted under the theme organizational challenges to effective CRM use. Similarly, recurring comments on memory-based tracking and role-dependent usage were linked to the theme *current state of CRM usage*. The categories for perceived benefits, KPI needs, and commissioner-specific views were structured in the same way, reflecting the thematic outline of the study.

4 Findings on CRM model development at SADE Innovations

4.1 Interviewee background and contextual roles

According to interviews all interviewees selected for this study share a notable characteristic according to interviews: they are technically trained professionals working in roles that bridge project delivery and customer collaboration. While the interviews were conducted across different functions within SADE Innovations Oy, only one of the participants has a commercial or marketing-oriented educational background. Mainly, their experience is grounded in engineering studies, technical project work, or industrial solution delivery. This shared orientation provides a critical lens for interpreting the expectations, perceived benefits, and practical challenges associated with the CRM model.

This feature also emerged directly from the interviews as a relevant background factor. Several participants reflected on how their technical orientation shaped their perspective on CRM: they approached it not as a sales tool, but as an operational structure for improving coordination, planning, and long-term client relationships. Although not a predefined research theme, this observation became visible in the way CRM was framed and evaluated across roles.

The interview responses consistently emphasized the importance of structure, transparency, and cross-functional coordination in customer relationship management. Rather than focusing on campaign-driven sales outcomes or lead generation metrics, the respondents framed CRM to achieve better visibility into account status, improve continuity between sales and engineering, and support proactive customer care. The CRM model was not described as a tool for commercial optimization, but as a shared environment that could clarify responsibilities and make customer data more actionable across technical workflows. From a qualitative perspective, this strong

uniformity in background helps explain why the CRM model is evaluated primarily through operational and coordination-related criteria.

4.2 Current state of CRM usage at SADE Innovations

Prior to the development of the CRM model, SADE Innovations did not have a structured or systematic approach to managing customer relationships. Jira (Atlassian, n.d.) was used as the main tool for storing customer-related information. According to both interview data and internal documentation, Jira was not designed for CRM purposes. It typically included basic information such as company names and brief project notes. More comprehensive elements—such as contact history, follow-up routines, and segmentation logic—were not part of the standard entries. Respondent A described the earlier model as “highly fragmented” and noted that tracking customer status often relied on informal notes or individual memory. Respondent C similarly stated that Jira supported short-term visibility but was not used for developing a longer-term understanding of account development.

Interviewees described the CRM-related data as often limited in both scope and consistency. Entries were typically created at the beginning of a project or when drafting an offer, but were not systematically updated over time. Respondent D, who works with public tenders and marketing, explained that customer information was often stored separately in email threads, Excel files, or personal notes, which made the overall picture difficult to maintain. While some users entered activity regularly, others relied more on internal discussions or memory to track customer interactions.

These descriptions reflect how customer-related information was handled prior to the introduction of the CRM model. This chapter is limited to presenting the current state. Expectations for CRM development are addressed in section 4.3, and organizational challenges related to implementation are discussed in section 4.6.

4.3 Internal expectations regarding the CRM model

At SADE Innovations Oy, expectations for the CRM model are strongly linked to the goal of replacing intuition-based customer routines with more structured and proactive practices. Interviewees expressed a shared need for clearer responsibilities, improved visibility into ongoing customer situations, and systematic follow-up. Several participants noted that the CRM model should replace informal note-taking and support more consistent documentation. There was a desire for tools and models that would help standardize how contacts are handled and ensure that key steps are not missed in long customer processes.

In addition to internal structure, the CRM model is expected to support prioritization. Respondents described how current customer engagement varies depending on timing, resourcing, and personal initiative. One participant compared customer reactivation to fishing, where timing is everything. Others emphasized that the model should help highlight which accounts are most likely to generate value, enabling the organization to focus its technical resources more effectively. The need for role-specific triggers, account planning support, and shared insight into customer status was consistently raised.

While adoption is ongoing, the results suggest that expectations for the CRM model reflect a shift toward more deliberate, cross-functional customer relationship management. Rather than being treated as a sales-specific tool, the model is expected to provide a common framework for organizing, monitoring, and developing customer relationships in a scalable and transparent manner. Several interviewees emphasized that the model must support long-term customer care beyond individual projects or deals. In practice, this means defining clear ownership structures, shared responsibilities, and uniform processes that guide follow-up activities. Respondents also pointed out that the model should support both human judgment and data-informed decisions.

All six interviewees emphasized that the company had reached a stage where more predictable, coordinated, and scalable practices in customer work were seen as increasingly important. Respondent F noted that previous experience in larger industrial organizations had highlighted the value of shared logic and structured customer processes. This exposure helped crystallize what a functioning CRM model should enable. Respondent D, who works with public tenders and marketing, added that a centralized CRM environment would allow smoother coordination between communication, sales, and delivery functions. These insights point to a strong internal awareness of the need for better-integrated tools and processes.

4.4 Perceived benefits of implementing the CRM model

Interviewees identified a range of benefits already emerging through the introduction of the CRM system and the developing CRM model. One recurring theme was improved visibility into the sales pipeline. Respondents A and B highlighted that shared documentation and real-time tracking have clarified the status of customer interactions and allowed better forecasting. Respondent E, reflecting a board-level view, emphasized that CRM enables management to see where engagement is lacking and to prioritize follow-up more systematically. Respondent F noted that this visibility also supports technical planning, as engineering teams can anticipate project flows and allocate resources accordingly.

Another frequently mentioned benefit was increased clarity in internal responsibilities. Before the CRM system, key information was often stored informally or remained undocumented, which created uncertainty in account ownership. Respondents C and F observed that centralized records now make it easier to assign and follow up on customer-related tasks. Respondent D stressed that this is especially relevant in public tendering contexts, where multiple team members contribute and continuity is essential. Interviewees agreed that this shift supports more consistent and transparent customer care routines across teams.

The CRM system also appeared to strengthen internal dialogue. Several respondents described how centralized customer data supports joint planning, status reviews, and decision-making. Respondents A and C mentioned that CRM structures discussions in sales meetings and facilitates cross-functional cooperation. Respondent E reflected that the timing of customer reactivation had improved through better visibility, and Respondent F emphasized that CRM prompts earlier technical involvement. Even those not using the system daily, such as D and E, saw its strategic value in aligning customer activities across departments.

Interviewees also described early benefits already visible from current CRM system usage. These included improved visibility into the sales pipeline, better tracking of offers, and enhanced management awareness. Even those not directly involved in sales reported that the system allowed them to anticipate future workloads based on upcoming opportunities. Visual tools and shared views into the customer base were seen as especially helpful by project and engineering roles. Together, these findings highlight clearer ownership, improved coordination, and stronger situational awareness as the key benefits emerging from early CRM adoption at SADE Innovations.

4.5 CRM-related Key Performance Indicators (KPIs)

Interviewees identified several CRM-related indicators that could strengthen predictability, prioritization, and internal coordination at SADE Innovations. While no standardized metrics are currently in daily use, the interviewees stressed that performance tracking is essential for moving from intuitive customer care to structured routines. One frequently mentioned metric was the presence of a documented next step for each customer. This would allow teams to maintain engagement systematically and prevent accounts from becoming inactive without notice. Other suggestions included basic contact frequency indicators and automated alerts for missing follow-ups.

Respondents also emphasized the value of tracking sales cycle length and conversion dynamics. By understanding how long it typically takes to move from initial contact to a confirmed deal, the organization can better allocate resources across different segments. Interviewees proposed that such metrics should be connected to pipeline forecasting, allowing engineering and project teams to prepare for upcoming workloads in advance. Tracking reasons for lost opportunities was seen as equally important. Systematic documentation of loss reasons would offer learning value and help refine customer targeting and qualification logic.

Across the interviews, performance indicators were seen as practical management tools. For example, some respondents noted that CRM metrics could help identify inconsistencies in follow-up routines or outdated contact plans. These insights reflect a shared interest in using CRM data not only for reporting, but as part of everyday customer coordination. Some respondents also proposed more strategic KPIs, such as customer lifetime value and loss reason tracking. These indicators were seen as relevant additions to support more structured customer care routines across roles.

4.6 Organizational challenges in CRM model adoption

This section answers the research question: What are the challenges to successful implementation? The interview questions were designed to explore this topic directly, focusing on potential structural, cultural, and practical factors that might hinder the adoption of the CRM model. Respondents were asked to describe difficulties related to implementation, as well as aspects they felt should be improved to support broader CRM use.

The interviews brought up several everyday challenges. Respondents A and F mentioned that limited time and competing priorities often lead to CRM updates being delayed or omitted. Respondent D noted that usage practices vary between teams, which makes shared visibility harder. In some cases, responsibilities were unclear. Respondent C pointed out that it is not always

defined who should take care of the next step in customer follow-up. These examples suggest that customer-related tasks are still handled inconsistently and depend on individual routines.

Attitudes and earlier experiences were also mentioned. Respondent B said that some engineers view CRM-related work as administrative rather than meaningful. Respondent F associated the current model with earlier systems that felt rigid or burdensome. While these opinions were not shared by everyone, they reflect a wider point: the CRM model is still being interpreted differently across the organization. Several responses indicated that the model's implementation is affected not only by technical or procedural issues, but also by cultural factors, unclear roles, and time constraints.

Several respondents also reflected on how the previous system limited their ability to manage customer relationships. Respondent F stated that Jira, which was used before the CRM model, offered only a surface-level view and lacked the visual clarity needed to understand customer status or project progress. In addition, the absence of a structured system made it difficult to prepare offers, especially when technical teams were not involved early on. Respondent B highlighted that the lack of real-time CRM data at the leadership level complicated the monitoring of account activity. These issues illustrate how the absence of a coordinated system previously led to fragmentation and gaps in operational alignment—challenges that the new CRM model is expected to address.

4.7 Value of the CRM model and associated KPIs for the commissioner

Based on the interview data and the development priorities of SADE Innovations Oy, several CRM performance indicators appear especially valuable for strengthening strategic customer management. Instead of focusing purely on sales outcomes, the suggested indicators emphasize internal consistency, process reliability, and cross-functional collaboration. Structured measurement was seen by interviewees as a critical step toward

enhancing predictability, transparency, and prioritization in customer engagement practices.

Among the most important metrics discussed was the tracking of next actions for customer accounts. Interviewees highlighted that missing or undefined follow-up steps often lead to customer inactivity and weakened engagement. Systematic monitoring of open tasks would not only address this gap but also improve internal coordination, particularly between sales and engineering teams. Another key metric proposed was sales cycle duration, helping the organization understand the effort and time required to move prospects through the pipeline. Interviewees emphasized that linking sales forecasting with project planning would improve resource allocation and future workload predictability across departments.

Respondents also stressed that CRM usage still varies significantly between roles. Measuring the extent of cross-functional participation in CRM entries would provide visibility into organizational adoption and help identify where additional onboarding or training is necessary. Follow-up completion rates and systematic documentation of lost opportunities were mentioned as critical improvements for refining customer targeting and operational learning. While the CRM model is still developing, these KPIs offer the commissioner a practical toolkit for monitoring CRM practices, identifying process gaps, and guiding the continuous enhancement of customer care strategies across the organization.

4.8 Examination of the reliability of the research

The reliability of this study was supported by several practices that ensured transparency and consistency in data collection and analysis. Semi-structured interviews were conducted systematically following a predefined interview guide, and responses were documented in real time using a collaborative validation method. Interviewees were able to view and correct the recorded answers immediately during each session, reducing the risk of interpretation

bias. The same thematic structure, based on the research questions, was applied consistently across all interviews.

The analysis process followed a deductive thematic approach where the research questions guided the grouping of responses. Original expressions were first simplified, then clustered based on thematic similarity, and finally abstracted into broader categories reflecting the key topics of the study. Although flexibility was allowed for capturing emerging insights, the overarching structure remained anchored to the predefined research objectives.

As with any qualitative research, this study has certain limitations that must be acknowledged. The number of interviewees was limited due to the size of the commissioner organization. While the participants were carefully selected for their relevance and experience, the small sample size may limit the generalizability of the findings to larger or structurally different organizations. In terms of data accuracy, the interviews were not recorded due to participant preferences, which may have affected the completeness of the collected data. Although detailed notes were taken during all interviews, some nuances or contextual information may have been lost.

Regarding the researcher’s role, the author has been involved in developing CRM-related practices at SADE Innovations but did not participate in the interviews themselves. This separation helps reduce the risk of researcher bias in the data collection phase. However, the interpretation of the results may still carry some subjective viewpoints, as the author has contextual familiarity with the organization. The timing of the study may also have influenced the findings. It was conducted during a period of organizational change and resource limitations, which may have shaped how the interviewees perceived the CRM model and their responses to it. These conditions may limit the extent to which the results reflect long-term strategic perspectives.

In addition to traditional qualitative methods, this thesis utilized OpenAI's ChatGPT to support the writing process. ChatGPT was employed as a language assistant to improve academic tone, enhance clarity, and maintain consistency throughout the document. The AI tool was not used to generate content or ideas, but to refine the expression of pre-written material. The use of ChatGPT was conducted according to APA guidelines for ethical AI assistance in academic writing (OpenAI, 2023). See Appendix 1 for examples of prompts used.

5 Conclusions

5.1 CRM adoption in a technically oriented organization

The interview data indicates that CRM system usage at SADE Innovations is still evolving and reflects the company's engineering-oriented culture. Interviewees emphasized that CRM is perceived primarily as a coordination tool that supports project delivery and internal transparency rather than as a sales optimization platform. Respondents noted that success with CRM requires integrating it naturally into technical workflows and cross-functional collaboration, not merely adopting new software. This aligns with Peppers and Rogers (2017, pp. 121–123), who emphasize that CRM adoption is influenced not only by technical implementation, but also by organizational identity and role-specific logic. At SADE Innovations, the effectiveness of CRM depends on how well the system supports the way teams work, communicate, and deliver value in project-driven settings. Internal structure, role clarity, and commitment to systematic follow-up were highlighted as essential prerequisites for deeper CRM model integration.

5.2 Interpretation of CRM system maturity and usage at SADE Innovations

CRM theory emphasizes that technical implementation alone does not lead to improved customer relationships; rather, it must be supported by behavioral change, systematic follow-up, and cross-functional collaboration (Buttle & Maklan, 2015; Payne & Frow, 2005). In particular, Buttle and Maklan (2015, pp. 22–23) describe a "pre-CRM state" where customer data is fragmented, memory-based processes dominate, and strategic engagement remains weak. According to Payne and Frow (2005), full CRM adoption requires linking strategy development, value creation, information management, multichannel integration, and performance measurement into everyday operations.

At SADE Innovations, empirical findings show that CRM adoption has progressed beyond initial system deployment but remains heavily dependent on individual initiative. While partial documentation routines and system use have improved visibility, consistent customer follow-up, ownership structures, and account planning are not yet systematically established. These observations mirror the implementation difficulties outlined by Buttle and Maklan (2015) in early CRM stages, where system presence does not automatically lead to behavioral integration. To reach the level of strategic customer management described by Payne and Frow (2005), SADE Innovations must now focus on reinforcing CRM-driven practices across roles, ensuring that customer information, follow-up, and relationship development become systematic, coordinated activities rather than isolated efforts.

5.3 Expectations for CRM: need for structure, continuity and ownership

CRM theory emphasizes that effective customer relationship management models must establish clear role definitions, ensure continuity in customer care, and create transparent structures for managing customer information (Buttle & Maklan, 2015, pp. 16–20; Payne & Frow, 2005). Without such systematic frameworks, customer relationships tend to remain fragmented and dependent on individual initiative, which undermines long-term value creation. A successful CRM model, according to theory, integrates customer-facing roles through standardized processes, coordinated information flow, and shared ownership of relationship development across departments. Strategic CRM is therefore not only a technical system, but an organizational practice that structures how customer engagement is planned, executed, and monitored.

Findings from the interviews at SADE Innovations show that employees involved in sales share expectations that are closely aligned with these theoretical principles. Interviewees consistently emphasized the need for a structured CRM model to replace intuition-driven, memory-based practices. They expressed a desire for clear responsibility allocation, improved visibility

into customer status, and systematic follow-up mechanisms. Furthermore, expectations extended beyond tool functionality toward establishing shared logic and coordination between sales and technical delivery. This alignment with theoretical models suggests strong awareness within the organization of the structural and cultural requirements for effective CRM. However, as current practices remain largely dependent on individual behaviors, significant work remains to translate these expectations into standardized routines, role clarity, and cross-functional ownership necessary for full CRM model maturity.

5.4 CRM-related benefits: transparency and collaboration

CRM literature emphasizes that the earliest organizational benefits of CRM adoption often arise through improved internal coordination rather than direct sales optimization. According to Peppers and Rogers (2017, pp. 77–79), CRM systems function as shared platforms that foster team-level planning, information transparency, and cross-functional dialogue. By providing a central point of reference for customer interactions, CRM tools help organizations move from fragmented, role-specific knowledge toward collective situational awareness. Similarly, Buttle and Maklan (2015, pp. 270–273) argue that the development of "structural readiness", the standardization of behaviors and alignment of internal understanding, is a critical foundation for achieving long-term CRM success. CRM systems are thus seen not merely as data repositories but as enablers of cultural and procedural change within organizations.

Empirical findings at SADE Innovations confirm that CRM adoption has begun to generate precisely these types of structural benefits. Interviewees described how CRM now facilitates shared visibility into customer activities, enabling better alignment of sales and technical functions, particularly in project planning and resource forecasting. Engineers are increasingly able to follow customer developments proactively, reducing information gaps and strengthening operational readiness. These observations suggest that SADE Innovations is progressing toward the "structural readiness" phase identified

by Buttle and Maklan (2015). However, while initial gains are clear, full realization of CRM's potential will require reinforcing these emerging practices with standardized processes, broader role-based CRM engagement, and leadership-driven expectations. Without such reinforcement, early improvements risk remaining localized rather than evolving into systematic, organization-wide collaboration.

5.5 KPI logic and internal feedback mechanisms

CRM literature emphasizes that the effectiveness of a CRM model should not be assessed purely through outcome-based figures such as revenue growth, but primarily through process-oriented indicators (Buttle & Maklan, 2015, pp. 290–293). Metrics like account plan coverage, contact rhythm adherence, and CRM system usage across roles serve as internal feedback mechanisms, revealing how consistently the CRM framework is being applied. Rather than functioning as passive dashboards, such KPIs should actively guide organizational learning, helping teams identify bottlenecks, address inconsistencies, and reinforce systematic customer engagement practices. In mature CRM environments, KPIs are embedded within operational routines and contribute directly to cross-functional coordination and continuous improvement.

Findings at SADE Innovations demonstrate a strong conceptual alignment with these theoretical principles. Interviewees recognized the value of CRM-related KPIs not merely as reporting tools, but as enablers of more proactive and coordinated customer care. Proposed indicators, such as task tracking, follow-up completion, and pipeline progression monitoring, mirror the process-oriented metrics described in the literature. Respondents emphasized that systematic KPI tracking could expose gaps in documentation, highlight ownership issues, and enable earlier interventions in customer relationship management. However, while the recognition of KPI value is clear, the full operational integration of these metrics into daily practices remains a development area.

These results suggest that SADE Innovations is well-positioned to advance its CRM maturity through KPI-driven internal feedback loops. By embedding CRM-related KPIs into daily routines and leadership evaluations, the company can shift from reactive, role-dependent customer care toward structured, strategic relationship management. The key lies not in creating the metrics themselves, but in ensuring that they are tightly linked to real operational processes and used consistently across departments. Successfully implementing such KPI logic would enable SADE Innovations to transform CRM from a supportive system into a central pillar of proactive customer value creation.

5.6 Organizational challenges in CRM model implementation

The findings confirm that CRM model implementation at SADE Innovations is influenced by a combination of practical, structural, and cultural challenges. Interviewees emphasized time pressure, role ambiguity, and inconsistent CRM usage across teams, issues that mirror theoretical concerns presented by Buttle and Maklan (2015) regarding organizational fragmentation and insufficient ownership. Respondents also described varying attitudes toward the model, with some associating it with unnecessary administration or past experiences of rigid systems. These cultural undercurrents align with Gartner’s (2023) view that CRM success depends not only on tool deployment but also on leadership-driven communication and employee buy-in.

The absence of clear responsibility for follow-up and documentation reflects what Payne and Frow (2005) describe as weak internal alignment, one of the most persistent barriers to CRM maturity. At SADE Innovations, these gaps appear not as resistance, but as signs of a partially embedded model where individual initiative still dominates over shared processes. Importantly, the study shows that CRM cannot succeed through technical integration alone; it must be embedded into routines, roles, and expectations in ways that account for legacy systems, professional identities, and perceived value. Without this

behavioral anchoring, even a strategically designed model risks remaining underused.

5.7 Managerial implications and strategic value for the commissioner

CRM literature highlights that process-oriented Key Performance Indicators (KPIs) are essential for embedding CRM models into everyday business practices (Buttle & Maklan, 2015, pp. 291–293). Metrics such as contact frequency, task completion rates, and cross-functional CRM usage are not merely tools for reporting outcomes, but mechanisms for monitoring whether systematic, customer-centric routines are being consistently applied. Effective CRM management depends on making performance visible across roles, enabling managers to identify gaps, reallocate support, and reinforce process adherence. By integrating KPIs into internal operating logic, organizations move beyond intuition-based relationship management toward structured, scalable customer engagement.

Empirical findings at SADE Innovations support this theoretical view. Interviewees emphasized that sales results alone are insufficient; true CRM success requires visibility into underlying activities, such as documented follow-ups, ownership of customer interactions, and systematic pipeline management. Metrics like next action documentation and cross-functional CRM usage were seen as key levers for improving continuity, transparency, and internal alignment. Furthermore, CRM-related KPIs were recognized as enablers of better collaboration between sales and technical teams, addressing previously identified gaps in customer handovers and ongoing relationship development.

Strategically, the implementation of CRM-driven KPIs offers SADE Innovations a valuable tool for enhancing organizational learning and planning capacity. By shifting CRM from a personal memory aid to a shared strategic framework, measurable indicators help balance operational agility with accountability. In a technology company characterized by complex project lifecycles and

specialized customer engagements, this shift is critical for sustaining growth. When integrated systematically, CRM KPIs form a feedback loop that not only strengthens internal processes but also supports customer success, positioning CRM as a cornerstone of scalable, strategic relationship management at SADE Innovations.

5.8 Final conclusions

This study investigated how a structured CRM model could strengthen customer relationship development at SADE Innovations Oy. The research focused on mapping the current state, expectations, perceived benefits, organizational challenges and key performance indicators (KPIs) in a technically oriented B2B environment. While clear progress was made, early adoption faced challenges such as fragmented documentation, unclear responsibilities, and inconsistent CRM practices.

The findings confirm that when supported by organizational commitment, role clarity, and appropriate digital tools, a CRM model can significantly improve internal coordination, customer satisfaction, and long-term business performance. Employees expect CRM to establish shared logic, ownership, and continuity, aligning closely with theoretical models by Buttle and Maklan (2015) and Payne and Frow (2005). CRM-related KPIs were also identified as critical tools for creating feedback loops that promote organizational learning and operational alignment.

In summary, CRM emerges not merely as a system, but as a strategic framework that enables cross-functional collaboration, transparency, and scalable relationship value. This research provides not only practical insights for CRM development in project-driven technology companies but also adds to the academic understanding of CRM maturity evaluation in small and mid-sized organizations.

5.9 Further development and opportunities of CRM model

As SADE Innovations Oy continues to adopt its CRM system, the model remains intentionally simple to support early-stage usage across roles. Over time, it is expected to evolve into a more layered framework, integrating deeper insights into customer behavior, organizational culture, and stakeholder preferences. Enhancing automation and predictive analytics will play a key role in this development, helping to prioritize activities and allocate resources more effectively.

Emerging technologies such as artificial intelligence (AI) and large language models (LLMs) already enable the identification of customer trends, needs, and decision-maker profiles from public sources. Embedding such tools into the CRM model could trigger proactive account management actions, for instance, intensified engagement when a client secures new funding or expands operations. This would improve timing, targeting, and SADE's reputation as a responsive, knowledgeable partner.

To sustain relevance, the CRM model must be treated as a dynamic system, continuously reviewed and refined. Future iterations may expand customer engagement beyond traditional sales processes toward strategic co-development and community-building initiatives. Technological advancements will therefore be central in transforming CRM from a passive database into a predictive and strategic enabler of long-term customer relationships.

5.10 Future research ideas

One academically relevant idea for future research is the integration of strategic targeting logic directly into CRM systems. In many companies, Ideal Customer Profiles (ICPs) and buyer personas are created by marketing teams but kept separate from the tools used in daily sales work. Embedding these definitions into the CRM interface, so that they actively guide prospecting and segmentation, could increase consistency across functions. The combination

could be especially powerful when supported by large language models (LLMs) that are capable of scanning external data and suggesting matching leads in real time (OpenAI, 2024). This type of system would represent a shift from passive data storage toward active decision support.

This idea opens several academic research questions. What level of precision can such a system achieve? How do different teams respond to machine-generated targeting suggestions? And to what extent do these tools actually improve sales outcomes in B2B settings? Prior studies have explored the role of CRM in data-driven sales planning (Chatterjee et al., 2019), but the strategic use of AI at the prospecting stage remains understudied. This makes it a suitable focus for future academic investigation, especially in contexts where targeting is complex and resource-intensive (Kumar & Reinartz, 2018).

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Appendix 1. Use of ChatGPT in Language Support

ChatGPT (OpenAI, 2023) was used during the thesis writing process strictly for language refinement and clarity improvements. The model was not used to generate original content or arguments, but rather to:

- Improve the academic tone and grammar of sections already written by the author
- Help rephrase complex sentences for clarity and consistency in English
- Ensure terminological consistency across theoretical concepts
- Suggest alternative wording or structure based on academic writing style.

All content included in the thesis was written, evaluated, and referenced by the author. ChatGPT was used similarly as a proofreading tool and did not contribute substantively to the research design, analysis, or theoretical framework.

Example Prompts Used for Language Refinement

Academic tone improvement
"Can you improve the academic tone and grammar of this paragraph without changing the meaning?"

Clarification of expression
"Please suggest a clearer way to express this sentence in academic English: '[insert sentence]'"

Consistency of terminology
"Does the use of the term 'CRM model' sound consistent and clear in this context? If not, suggest improvements."

Reference formatting check
"Can you check if this APA-style in-text citation is correctly placed and formatted?"

Appendix 2. Final version of interview form

CRM Model Interview Form / SADE Innovations Oy

This interview form is part of a Master's thesis at Turku University of Applied Sciences titled "Customer relationship management model for SADE Innovations Oy."

In this study, CRM (Customer Relationship Management) is understood as a strategic model for managing and developing customer relationships, not merely as a technical system. The interview collects information about the current use of the CRM system and views on what kind of customer management model would best support the work of SADE Innovations in the future.

- The interviewer fills out the form based on the discussion.
- Responses will be handled confidentially and anonymized during the analysis phase.
- The study follows the research ethics guidelines of Turku University of Applied Sciences.
- The interview data will be retained only for the duration of the analysis phase, after which it will be securely destroyed.
- Individual responses cannot be linked to persons, and all analysis is conducted anonymously.

Interviewee information

Name:

Job title:

Work experience (in years):

Education:

Duration of the interview:

Questions

Introduction to CRM system-related questions

Next, we will ask for your views on the current CRM system used at SADE Innovations, i.e., Pipedrive. These questions aim to map out how the system is currently used, what benefits it has brought, and what areas may still need development.

This interview is part of a broader study to develop a comprehensive customer relationship management model for SADE Innovations. To build a CRM model that fits the organization, it is important to understand the starting point: what practices already exist, and how the current system supports customer management in practice.

Your answers will help identify what works well and where there may be opportunities to improve consistency or collaboration in managing customer relationships. We are talking about your experiences, not about right or wrong ways to use the system.

1. Current state of the CRM system at SADE Innovations

1.1 Have you used the current CRM system (Pipedrive) at SADE Innovations?

- If yes, for how long and for what purposes?

1.2 Have you used CRM systems in other organizations?

- If yes, which systems and in what roles?

1.3 How is the CRM system (Pipedrive) currently used in your own work?

- What kind of tasks or customer situations are handled through it?

1.4 What currently works well in the CRM system or in how it is used?

1.5 In your opinion, what are the shortcomings or challenges?

1.6 How consistently do you think the CRM system is used across different teams or roles?

- Is there variation in usage? If so, where?

2. Benefits of the CRM system

2.1 What concrete benefits have you gained from using the CRM system?

- Can you give examples?

2.2 How has the CRM system affected customer relationship management in your work?

- Has managing or tracking customer data changed?

2.3 Has the use of the CRM system increased collaboration between teams?

- If yes, how does this show in practice?

2.4 Has the CRM system increased transparency within the organization?

- In what situations is this most evident?

2.5 What other ideas or thoughts do you have about utilizing the CRM system?

Introduction to the CRM model concept (for interviewer use)

In this study, the CRM model refers to a planned and jointly agreed way of managing customer relationships within the company. In the future, the model could include principles for storing customer data, tracking communication, segmenting customers, and reporting. A CRM model does not yet officially exist at SADE Innovations; the aim of this thesis is to develop such a model in cooperation with the staff.

3. Expectations for the CRM model

3.1 What expectations do you have for the future CRM model?

- What aspects would you like it to clarify or improve?
- What experience do you have with the current customer management practices?

3.2 What should the CRM model enable in sales work?

- (e.g., up-to-date customer information, account overviews, systematic approach…)

3.3 In what ways should the CRM model support sales work?

- (e.g., offer processes, prioritization, customer development…)

4. Barriers and challenges to CRM model implementation

4.1 What challenges do you see in developing or implementing a CRM model at SADE Innovations?

- Are there any areas that are particularly difficult to define or agree upon?

4.2 Are there any structural elements in the organization that could prevent or hinder the adoption of a CRM model?

- For example, unclear roles, lack of resources, practical interfaces?

4.3 What about in the organizational culture—are there any attitudes or practices that could make adopting the model more difficult?

- For example, collaboration habits, attitude toward documentation or systematic working?

4.4 What changes or improvements do you think are needed to make it easier to adapt and use the CRM model in daily work?

- For example, instructions, responsibilities, support or communication? Communication, training, and agreeing on shared practices.

5. Metrics offered by the CRM model and their significance

5.1 What metrics do you currently use actively through the CRM system in your work?

- For example, sales pipeline, contacts, customer account status, activity tracking?

5.2 Which of these metrics are particularly useful for your own work?

- Why do you find them useful?

5.3 Are there metrics that you think are especially useful for your team (or the organization as a whole)?

- Explain why you consider these metrics meaningful.

5.4 Are there any metrics that you think should be added to the future CRM model?

- Why do you find them important? What added value would they bring?

6. Other possible thoughts and suggestions

6.1 Do you have any other thoughts or development ideas regarding the future of the CRM model?