

IMPLEMENTATION OF A CRM SYSTEM

Case: Company X

LAHTI UNIVERSITY OF APPLIED
SCIENCES
Faculty of Business Studies
Degree Programme in International
Business
Bachelor's Thesis
Spring 2016
Fanny Josefina Sutela

Lahti University of Applied Sciences
Degree Programme in International Business

SUTELA, FANNY JOSEFINA: Implementation of a CRM system
Case: Company X

Bachelor's Thesis in International Business 47 pages, 2 pages of
appendices

Spring 2016

ABSTRACT

Customer relationship management (CRM) systems are organization's commonly used information systems, whereby organizations pursue more efficient ways of doing business by following their customer relationships and sales. This thesis is commissioned by Company X and it studies CRM software implementation success from the point of view of users, who are Company X's employees. CRM software, Microsoft Dynamics CRM, has been introduced in Company X starting from autumn 2014.

The theoretical part of this thesis studies different concepts of CRM, CRM system features through process phases and the requirements for successful implementation. The theoretical part was composed by using related literature, various articles and reliable web pages. The empirical part of the thesis was conducted by means of a survey. The results were used in studying how satisfied users were with the CRM software implementation in Company X.

Results show that one should pay more attention to future users in CRM implementations. Responses also revealed that, for example, training sessions and information flows did not meet the respondents' needs. However, the software is seen as a potential sales tool among the respondents. The survey will provide Company X with suggestions for further development of the software.

Key words: CRM, Customer Relationship Management, software implementation, requirements for successful implementation

Lahden ammattikorkeakoulu
Degree Programme in International Business

SUTELA, FANNY JOSEFINA: Implementation of a CRM System
Case: Company X

Bachelor's Thesis in International Business, 47 sivua, 2 liitesivua

Kevät 2016

TIIVISTELMÄ

Asiakkuudenhallintajärjestelmät (CRM, customer relationship management) ovat yritysten yleisesti käyttämiä tietojärjestelmiä, joiden avulla yritys pyrkii tehokkaampaan toimintaan seuraamalla asiakkuuksiaan ja myyntiään. Tämä opinnäytetyö tutkii Yritys X:n toimeksiannosta heidän asiakkuudenhallintajärjestelmänsä käyttöönoton onnistumista sekä kehitystä yrityksen työntekijöiden näkökulmasta. Yrityksessä otettiin käyttöön Microsoft Dynamics CRM –järjestelmä syksystä 2014 alkaen.

Tutkimuksen teoriaosuus käy läpi CRM:n eri määritelmiä, tutkii asiakkuudenhallintajärjestelmien ominaisuuksia ja sisältää onnistuneen CRM-käyttöönoton vaatimukset. Teoriaosuus on koostettu aihetta käsittelevien kirjojen, julkaisujen ja erilaisten luotettavien internetlähteiden avulla. Tutkimuksen empiirinen osuus toteutettiin käyttäjäkyselynä, jonka avulla tutkittiin käyttäjien mielipiteitä järjestelmän käyttöönotosta Yrityksessä X.

Tulosten perusteella voidaan todeta, että käyttöönotoissa tulisi panostaa enemmän tulevien käyttäjien huomioimiseen. Vastauksista ilmeni muun muassa, että CRM-ohjelman käyttöönoton kouluttaminen ja tiedonkulun sujuvuus eivät vastanneet kyselyyn vastanneiden tarpeita. Ohjelma nähdään vastaajien keskuudessa kuitenkin potentiaalisena myynnin apuvälineenä, ja kysely antaa parannusehdotuksia järjestelmän kehittämiseen jatkossa.

Avainsanat: CRM, asiakkuudenhallintajärjestelmä, järjestelmän käyttöönotto, onnistuneen käyttöönoton edellytykset

CONTENT

1	INTRODUCTION	1
1.1	Background	1
1.2	Thesis Objective, Research Questions and Limitations	2
1.3	Theoretical Framework	4
1.4	Research Methods and Data Collection	5
1.5	Thesis structure	6
2	CRM - CUSTOMER RELATIONSHIP MANAGEMENT	8
2.1	CRM systems	9
2.2	CRM implementation phases	10
3	REQUIREMENTS FOR SUCCESSFUL IMPLEMENTATION	14
3.1	Management	15
3.2	Employees	16
3.3	Technical Support	17
3.4	Other Issues	17
4	EMPIRICAL RESEARCH	19
4.1	Company X's CRM implementation	19
4.2	Survey Design and Formulation	22
4.3	Data acquisition process	24
4.4	Data Analysis	25
4.4.1	Background questions	26
4.4.2	CRM implementation phase	28
4.4.3	Usage	31
4.4.4	Prospects	36
5	CONCLUSION	39
5.1	Answers to Research Questions	39
5.2	Validity and Reliability	42
5.3	Suggestions for Further Research	42
6	SUMMARY	43
	REFERENCES	44
	APPENDICES	48

LIST OF FIGURES

- FIGURE 1. Theoretical framework steps
- FIGURE 2. Research strategies
- FIGURE 3. Thesis structure
- FIGURE 4. CRM from different aspects
- FIGURE 5. CRM process phases
- FIGURE 6. Data transfer process
- FIGURE 7. Data acquisition process
- FIGURE 8. Company X business unit division
- FIGURE 9. Sales role in the company
- FIGURE 10. Years in a position where CRM is needed
- FIGURE 11. Earlier experiences of CRM software
- FIGURE 12. Training session's satisfaction rates
- FIGURE 13. Information about CRM implementations time and place
- FIGURE 14. Dynamite CRM difficulty to use
- FIGURE 15. Know-how to use CRM after the training session
- FIGURE 16. Usage of the software
- FIGURE 17. How much users have benefited from using CRM?
- FIGURE 18. How many users had faced technical problems during use?
- FIGURE 19. Technical support satisfaction rates
- FIGURE 20. Times of contacting technical support
- FIGURE 21. Using CRM satisfaction rates
- FIGURE 22. Benefits of the CRM usage
- FIGURE 23. Relevance of Marketing Automation in CRM

LIST OF TABLES

TABLE 1. Roll-out order by the business unit

TABLE 2. Answers for sub-questions

TABLE 3. Answer to the main research question

1 INTRODUCTION

The first chapter of this thesis is divided into five sub-chapters. The main purpose of these sub-chapters is to introduce the background, objectives, research questions and limitations for the study. Also theoretical framework and research methods are stated. The last sub-chapter describes the thesis structure in its entirety.

1.1 Background

Finland's economic situation has been a topic of discussion in recent years due to rising cost levels and increasing competition in international markets (Elinkeinoelämän Keskusliitto 2015). Co-operation negotiations have become more frequent, which has, in turn, caused the rapid growth of unemployment rate; the real Gross Domestic Product (GDP) has still been decreasing and income taxation has been tightened (S-pankki 2015). Even Nordea Bank AB stated in June of 2015 that Finland's economic situation is in downturn and recession is becoming a real threat (Taloussanommat 2015). Challenging and more competitive markets have also driven Finnish companies to invest in long-term relationships with customers to obtain their competitiveness. Investing in this context means understanding customer behavior by proper management. While technology has developed during the last two decades, so have the computerized applications, such as Customer Relationship Management (CRM) systems. (Klimanov & Frolkina 2015, 77.)

The 1990's was an expansive breakthrough in information and communication technology. It became a trend and it has been a trend since then. This kind of penetration in technology affected the development and usage of marketing causing also increase in popularity of CRM systems' implementation. CRM system provides companies with an insight of their customers' behavior. (Pupovac, Zehetner & Sudarevic 2012, 1.)

CRM is generally used to segment, classify and follow customers. Receiving valuable information about relationships with existing customers is the key towards better customer understanding. (Lambert 2010, 25.)

The subject of this thesis is from a local metal industry supplier. The mission is to study the CRM implementation's success in Company X. In this thesis the focus is on the software called Microsoft Dynamics CRM, which is the application used in the company, and in its implementation process. In addition, the survey results are studied through and used to evaluate the implementations' outcome. The subject of the thesis is current and benefits the future software implementations in the company.

1.2 Thesis Objective, Research Questions and Limitations

The objective of this thesis is to create a report about Microsoft Dynamics CRM implementation success in Company X. This report should offer a clear insight of the possible shortcomings in CRM implementation process. The thesis consists of a theory part and a survey part. The survey results can support the development of the CRM tool and provide necessary information for evaluating the whole implementation process in the company.

The purpose of this thesis is to improve implementation processes of computer applications in Company X. Also the management team will receive valuable information concerning the process steps, such as preparations, training and usage. In the long term the report can facilitate implementation processes and also decrease the amount of currently existing CRM –problems.

According to C.R. Kothari (2004, 34) "a good research is empirical", and empirical means, that the research is based on a real situation where the subject is studied through concrete data. Thus, this thesis is an empirical research based on empirical evidence and has a practical perspective into the topic.

The method is suitable when studying the CRM implementation where part of the research is a user satisfaction survey, which gives statistics as a result.

To reach the goal, the research question is defined as follows:

How did Company X succeed in CRM implementation from the users' point of view?

The purpose of the sub-questions is to facilitate answering to the main question:

- What is the definition of CRM?
- What are the CRM implementation phases?
- What are the requirements for successful CRM software implementation?

The thesis studies CRM software and its implementation process. However, also the definition of CRM is introduced to gain better understanding of the whole study. The main focus stays on a CRM software called Microsoft Dynamics CRM and in this thesis an abbreviation Dynamics CRM is used when talking about this specific Microsoft's software. In addition, when referring to the implementation of CRM software, CRM implementation is used.

There are several limitations in this thesis to keep the structure clear and the survey sampling as authentic as possible. For example, the software supplier's tendering stage is not included into this thesis. Also the population of the survey was limited to Company's 14 business units, who had used CRM over a month.

1.3 Theoretical Framework

Theoretical framework introduces the theory part of the thesis. This study concentrates on CRM software implementation, which is also shown in theory parts' content. Theoretical framework is divided into three steps in order to give clear understanding of the topic. These steps are shown in FIGURE 1: concepts, process phases and management.

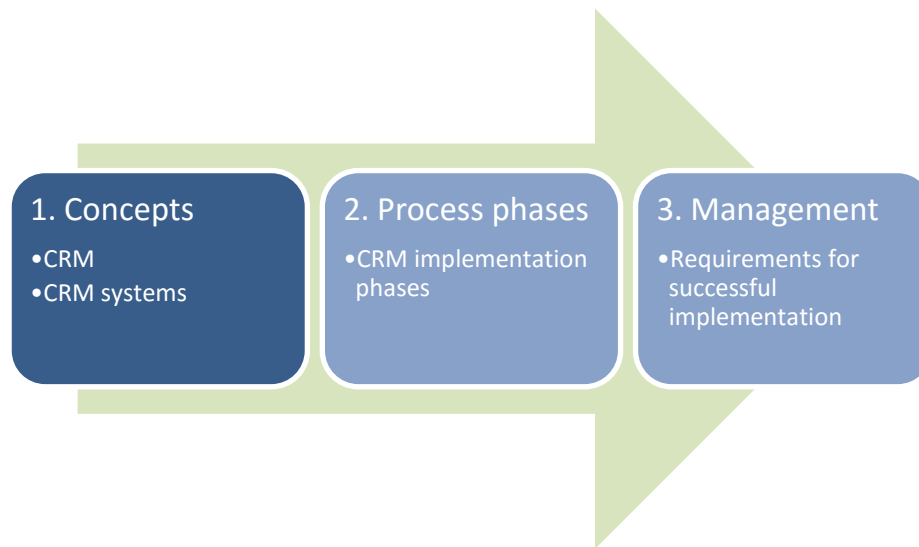


FIGURE 1. Theoretical framework steps

CRM concepts and process phases are introduced in the second chapter. According to Francis Buttle and Stan Maklan (2015, 360) the whole CRM project is a five-step process. These project phases are presented briefly to give understanding of CRM implementation process in its entirety. Third chapter introduces the project management part, which includes the requirements for successful implementation. These theory-based requirements were also used in designing survey questions.

1.4 Research Methods and Data Collection

This sub-chapter defines the research methods and how the data for this study is collected. There are two different kinds of research approaches: deductive and inductive approach. In a deductive approach the main point is to use data to test a theory, while inductive approach is more like developing a new and more accurate theoretical perspective on the topic to challenge already existing literature. (Saunders, Lewis, & Thornhill 2012, 162.) Since the aim of this study is to find the answer to a research question through theory and online survey, and not to develop new theories, the research approach is deductive.

A deductive approach is usually part of quantitative research, which includes, for example, studying the research through numeric data. Quantitative research design is typically used when collecting research data through surveys or interviews. (Saunders, Lewis & Thornhill 2012, 163.)

There are three basic research strategies: experimental, survey research and case research. These strategies will help in choosing the right research method as well. FIGURE 2 has defined the main features of these strategies.

Experimental research	Survey research	Case research
<ul style="list-style-type: none"> • Population sample • Changes created by changing circumstances • Usually testing hypothesis 	<ul style="list-style-type: none"> • Standard population • Data collection through survey or interview 	<ul style="list-style-type: none"> • One case • Intensive study • Data collection by using several methods

FIGURE 2. Research strategies (Hirsjärvi, Remes & Sajavaara 2010, 134)

Experimental research is usually based on a hypothesis and studies the subject by changing the circumstances. Through these changes the experimental research tries to figure out solutions and test the hypothesis in general. In survey research the data is collected from a standard population by using a survey or interview technique. These results are used to explain, for example, why some phenomenon has occurred. Case study, on the other hand, studies only one case and more detail. It is an intensive study where data collection happens by using several methods. (Hirsjärvi, Remes & Sajavaara 2010, 134.) According to these main features can be stated that this study uses survey research as a research strategy.

Since in this thesis the data is collected through online survey and the received results are used in describing and understanding the situation in Company X, the research method used is quantitative. The data collected from the survey and interviews is the primary data for this study. Interviews were made both face to face and via email. Secondary data is formed by using relevant literature, articles and reliable Internet sites to contribute to this thesis.

1.5 Thesis structure

This study has six main chapters starting with introduction, where thesis objectives are introduced and research questions are stated. The, introduction chapter includes five sub-chapters, where also theoretical framework and research methods are studied and presented. Steps are illustrated in FIGURE 3 and explained in the following paragraphs.

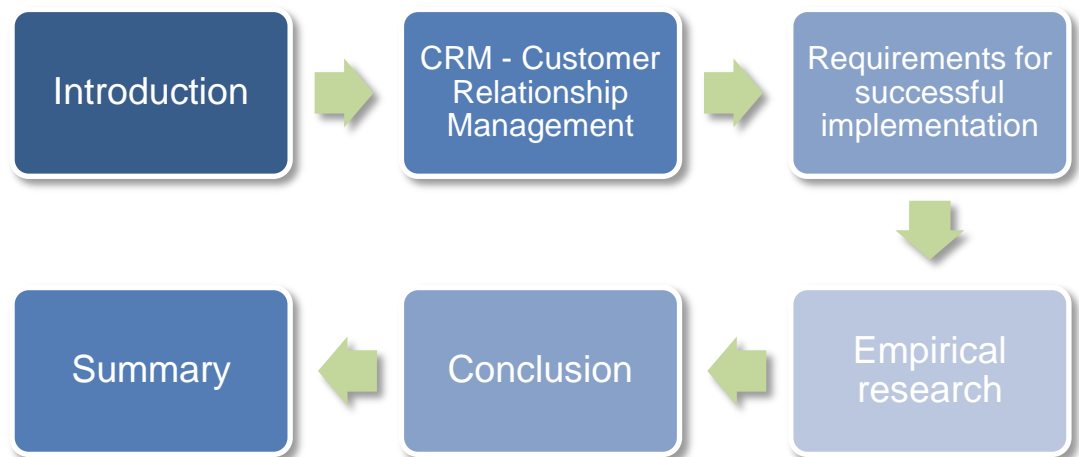


FIGURE 3. Thesis structure

To understand this study better, it is important to grasp the meaning of customer relationship management as well. The second chapter deals with the concept of CRM, CRM software and states its implementation phases. The third chapter introduces the main requirements for successful software implementation based on earlier studies.

However, the main interest of the whole thesis is on the fourth chapter, which is about the empirical research. The fourth chapter introduces Company X's implementation process so that the reader can see the starting point for the whole project. This chapter goes through the survey design and summarizes the whole survey process in detail: how it was implemented and what was the response rate. After presenting the acquisition process, the received data is analyzed in the last sub-chapter. Conclusion of the whole process can be found in chapter five where also suggestions for the case company are made. Main points of the thesis are summarized in the chapter six, which is also the last chapter of the thesis.

2 CRM - CUSTOMER RELATIONSHIP MANAGEMENT

CRM has many meanings and therefore can be understood in several ways. Payne and Flow (2006, 136) have stated that CRM is all about building long-term relationships with customers. Besides a concept, CRM is also an approach which helps organizations to evaluate potential customers, acquire them and keep their interests up. According to Oksanen (2010, 22), customer relationship management is a customer-oriented marketing strategy, which is implemented into the company strategy to maximize profit earnings through customer relationships. CRM is also defined as a process for controlling meetings concerning, for example, marketing sales and customer services.

In addition, CRM is a system to support organizations' business and in recent years the popularity of such customer relationship management systems has increased. Therefore, this study concentrates on CRM as a business support system. In the following sub-chapters, the reader is introduced to CRM systems in general and to the actual software implementation phases. (FIGURE 4.)

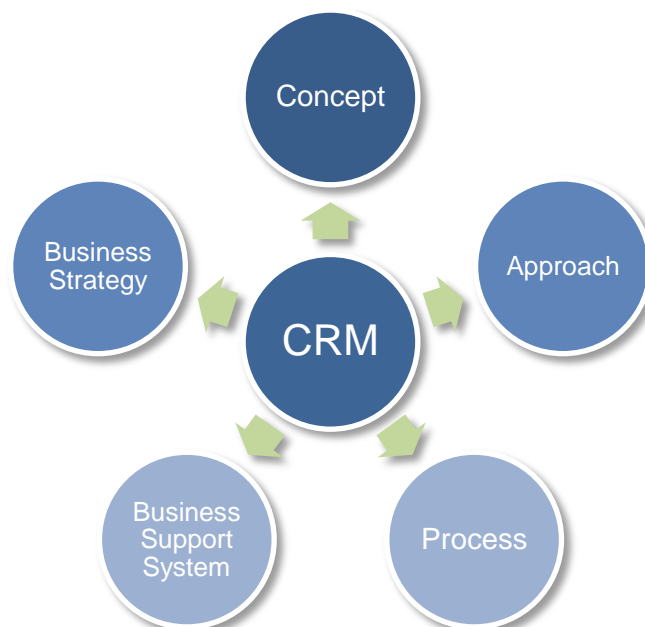


FIGURE 4. CRM from different aspects (Oksanen 2010, 22)

2.1 CRM systems

Several CRM systems have been developed during the last decade to maintain relationships with existing customers, but also, to recognize and target profitable ones. Sugar CRM, SalesForce, SuperOffice, PipeDrive and Microsoft Dynamics can be mentioned as examples. All mentioned ones can be custom-made systems based on the needs of the company, and therefore larger companies usually end up implementing one of them. Microsoft's version is usually chosen, if the organization is already using several other Microsoft's software. (Ahonen 2016.)

CRM systems can be described as customer information banks. These systems are only for licensed users to secure important customer data from company outsiders. The software has bases for customer information, contact persons and projects. Sales persons are encouraged to fill in every activity they have had with the customer, so that everything can be monitored by managers and followed by colleagues. (Oksanen 2010, 298.) One of the positive sides of CRM software is that while sales persons fill in new activities and update older ones, CRM creates reports, which are valuable for sales management. These reports show clearly, if there is, for example, decreasing sales volume or if some department could do more customer visits to increase the amount of sales.

Problems will start occurring, if sales persons are inactive in using CRM software. Then reports will be out of date and give a wrong image of the business situation. (Oksanen 2010, 288-289.) If CRM software is used in a company regularly and employees understand the importance of its usage, it is a remarkable tool for increasing organizations profitability.

Microsoft Corporation is a global technology company mostly known of computer applications. The first CRM system, Microsoft Dynamics CRM, was launched in January 2003. Dynamics CRM is a tool for organizations to improve business processes through customer relationship management. The software enables companies to keep their customer data in a clear and organized form in one place and also to keep track of contacts and opportunity processes. (Microsoft Dynamics 2015.)

Dynamics CRM is a suitable system for those organizations, which are using other software from Microsoft's product family as well. It is possible to integrate Dynamics CRM, for example, with Outlook and Sharepoint - services, which is a tempting feature. (Ahonen, 2016.) With CRM systems, organizations expect assistance in controlling customerships and ongoing projects, and with the add-on's Dynamics CRM is offering, the aim is more convenient to achieve. Dynamics CRM is a configurable software and enables organizations to manage business in the most suitable way. (Tileaga, Nitu & Nitu V 2013, 400.)

2.2 CRM implementation phases

Even though this study concentrates on the implementation phase of the project, the whole process is introduced in this sub-chapter. It is very important to understand that CRM is not only about information technology (Buttle & Maklan 2015, 16). There are three steps before the actual project implementation can be executed, such as: developing the CRM strategy, building up the CRM project foundations and needs specification and partner selection (FIGURE 5). All the phases are introduced in this sub-chapter.

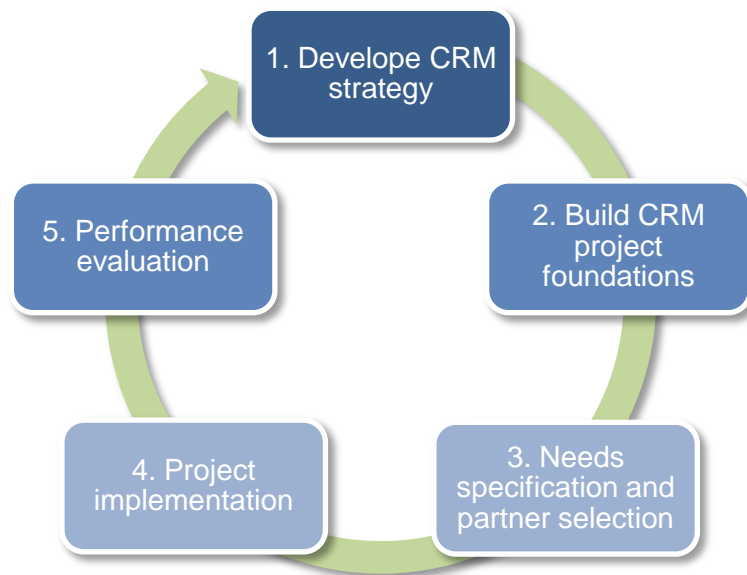


FIGURE 5. CRM process phases (Buttle & Maklan 2015, 360)

1. The first step in the whole process is to develop the CRM strategy, which includes tasks like: analyzing the situation, developing CRM vision, executing CRM education, establishing goals and objectives, identifying resources and estimated costs for the project. Situation analysis is in short a SWOT analysis about company's current customer strategy showing strengths, weaknesses, opportunities and threats of the situation. CRM education is on the other hand important to be executed in the beginning of the whole process since each participating department (IT, marketing and sales management) will automatically have their own perspective for the project. CRM vision is a statement that defines how the implementation will actually change the effects of business to the customers. Goals and objectives for CRM projects can be everything from increasing customer loyalty to reducing cost of sales. Usually CRM strategies have several goals. (Buttle & Maklan 2015, 360-364.)

Budget and resource planning is part of the first phase as well. Readiness in IT, people, time and money needs to be evaluated. Well planned strategy will not only save organizations from spending too much money on the project, but show, if the company is even able to execute the implementation at the moment. The final decision to continue to the next phase comes from the board. (Buttle & Maklan 2015, 365.)

2. The second phase is about building up the project foundations. This includes, for example, identifying critical success factors and developing a risk management plan to find out the areas which could complicate the process and prevent it from succeeding. By identifying such issues, the implementation team can give extra attention to these areas during the process. CRM implementation is a large change in overall and to implement the idea of change to the employees, the future software users, is truly important. Worse resistance movement towards the upcoming change can be prevented by identifying the needs of change management. This step is also included to the second phase, and is more than necessary to be completed. (Buttle & Maklan. 2015, 368.)
3. Before the actual CRM implementation phase, there is a third phase where needs specification and partner selection is finalized. So far the organization should have collected a document containing everything managed in the first two steps and showing also organizations' way of CRM thinking in overall. That document, known as request for proposals (RFP), is needed when tendering out different service providers, since it will help these vendors to offer exactly what is required to complete the phase. (Buttle & Maklan 2015, 378.)

4. Phase four is the actual CRM implementation phase, where the system prototype is tested and modified before roll out is executed. Testing shows if the software is functional and usable or not. Also other technology customization is completed, if necessary. It is important to find solutions to all existing problems before the software is adopted to the organization's everyday use. (Buttle & Maklan 2015, 380.)

5. Performance evaluation is done in the fifth phase, which is the last phase of the whole process. Performance can be evaluated through project outcomes: delivered on time and to budget, and business outcome: have stated objectives been achieved. (Buttle & Maklan 2015, 380.)

3 REQUIREMENTS FOR SUCCESSFUL IMPLEMENTATION

Studies show that approximately 55 % of all CRM projects do not produce any results (Rigby, Reichheld & Scheffer 2002, 102). The high failing rate is usually caused by organizations, which have stated more than one objective to be accomplished, and when projects overrun timescales, hence exceed budgets, CRM projects will suffer damages (Payne & Frow 2006, 154; Buttle & Maklan 2015, 91). Implementing a new software into a company is a challenge, since it becomes part of their business, as well as part of their operating strategy as a whole. This is a process where only few succeed. (Oksanen 2010, 30.) This chapter examines the requirements for successful implementation and states some of the most important steps that organizations need to fulfil in order to receive convenient results.

According to Tommi Oksanen (2010, 29) there are three points which can define, if the CRM project has been successful or not. If these following points are realized after two years from the implementation, it can be said that the project has succeeded.

1. At least four out of five of CRM users are using the software regularly.
2. The organization depends on the system, meaning that the software provides useful information for the organization.
3. CRM software is an essential part in the organization's data management.

CRM projects are like large puzzles, becoming one piece by piece (Buttle & Maklan 2015, 361). To reach the goal, several steps need to be accomplished. These steps can be categorized into four sections: management, employees, technical support and other issues.

3.1 Management

Increased competition, changing customer base and need to meet current and future customer expectations are, for example, cases which are driving organizations towards CRM software (Steel, Dubelaar & Ewing 2013, 1334). The decision of execution comes from the organization's board, the leading management team, who considers CRM implementation to be timely and valuable investment for the business. However, succeeding in the project itself requires well-executed management and leadership during the whole process. (Oksanen 2010, 30.)

Good managing includes well-chosen project team, which has the capacity to work on the project from the start till the end. Every CRM project should have a responsible person, the main user, who is on the top of everything concerning the software implementation. The main user is usually chosen to be the project leader, who is also the link between the board and the team. Basically the main user follows the ongoing process, is responsible for the working support team and makes sure that problems are solved, motivates and notifies employees about the ongoing project phases, and is strongly involved in the actual implementation. (Oksanen 2010, 109; Piskar & Faganel 2009, 201.) Like Oksanen (2010, 108) has stated; "Behind every well working and actively used CRM system, there is a brilliant main user."

Organizations are responsible for notifying about every strategic change caused by the implementation and for providing proper training and support for employees (Becker, Greve & Albers 2010, 36). The project team has to plan the process schedule well and maintain fluent information flow not only between each other, but also between users. Ideal situation would be if the team could have check-up meetings periodically through the project. Project schedules should be formed to include data transferring phase and training sessions.

It is also important to understand that for most of the employees the software is completely new and that clear information package is more than necessary. When the schedule is clear and employees have got a user manual as a pre-task, training sessions should be easier to complete.

Training sessions are something where organizations like to decrease costs by organizing sessions by themselves. Unfortunately, training is the worst place to cut down the costs. The goal is to complete implementations successfully and this requires the usage of the software, which will not be happening, if users have lacking know-how. Since employees will be the users of the system, they should be trained properly. (Oksanen 2010, 259.)

3.2 Employees

Organization's future CRM users are the key factor for the working software and hence towards successful implementation (Payne & Frow 2006, 157). Without using the software by updating and creating new content, it does not serve its purpose. Therefore, convincing the employees to use the software is a necessity. Too often different kinds of projects fail because employee's knowledge, skills and personalities have been overlooked (Pinto & Slevin 1987, 25).

Larger organizations tend to have a lot of different types of software that employees are supposed to use in their everyday work. When introducing a completely new software, which is also affecting the business strategy in general, in most cases the welcome among employees is nonexistent. Therefore, selling the CRM for the employees is not only important, but a must. Oksanen (2010, 70-74) has listed some of the most used comments about CRM software among unsatisfied employees, such as "Again one more tool to operate with!", "These IT projects have never succeeded before!" and "We are doing fine without it anyway!"

Since such comments are commonly expressed and some type of resistance movement is always perceptible, employees play a huge role in CRM implementations.

Needless to say, resistance movement rarely includes an open-minded attitude and willingness to learn anything new. Therefore, the importance of knowing that one will be trained and supported to use the software, is valuable. Employee support can at best have an effect on employees' behavior and even turn pessimist think positively. (Becker, Greve & Albers 2010, 36.)

3.3 Technical Support

The software supplier is there to create suitable CRM software for the organization, but usually organizations' IT department is the general support during the actual implementation, since they have the knowledge of the organizations' systems in overall. Even though CRM is not only an IT issue, it still plays a huge role in the process. After all, the actual software forms the reports and holds the customer data in its data base, which is then used in evaluating business processes. IT department does software preparations, like software installations and integrations with other software, test uses the functionality of the software with CRM team and is ready to take quick actions to solve problems that users might face.

3.4 Other Issues

CRM implementation is strategically so large project that face-to-face communication is more than recommendable when starting the project with foreign subsidiaries. However, such projects are also expensive and there is a limited budget for different costs. Therefore, face to face meetings are not always an option. Fortunately, developed technology has enabled communication also through video calls, which is a good way to discuss or even give distance training, but it depends too much on the quality of the Internet connection.

This kind of issues are usually experienced in international implementations where location, language and cultural matters are also on the table. (Oksanen 2010, 43-45.)

Geographical distances are one of the main challenges for international organizations during CRM implementations. Not only is the process slow, but also a tempting chance to avoid responsibilities concerning the process. Long distances demand active communication between both parties and willingness to complete the project. If other party is not giving 100 percent for the implementation, the project will most likely fail or at least be completed in an insufficient way, which will be shown in CRM's functions. (Oksanen 2010, 44.)

Another challenge can be the communication between two offices, which do not share the same native language. Even though the way of communicating has become easier, language barriers and other cultural differences are still existing, and misunderstandings likely occur. Communicating by emails increases, for example, the risk of misunderstood instructions, which causes delays in the project, but also frustrations in both parties. Language barriers usually occur in training sessions as well. Therefore learning might be harder for some users. To secure smooth learning experiences, such issues need to be recognized by the CRM team before the training session is executed. Having an interpreter present can be surprisingly helpful, even though it slows down the training session significantly. (Oksanen 2010, 46.)

4 EMPIRICAL RESEARCH

In this thesis, the research data was collected online by using a user satisfaction survey. Therefore, this thesis is an empirical research, where the perspective is practical and concrete evidence is analyzed and measured (Jyväskylän yliopisto 2015). This chapter introduces Company X's CRM implementation process, goes through the survey questions and studies the outcome.

4.1 Company X's CRM implementation

Company X is a globally known metal industry supplier, which has expanded its operations already to over 30 countries. The organization of such a wide range decided to implement CRM system into their business strategy and fit customer-oriented marketing strategy to be part of their business.

The actual CRM project started in October 2013 with the first phase, where, for example, CRM vision was created. In January 2014 requests for proposals were sent and tendering out vendors started. The vendor was selected already in February 2014. The kick-off and starter training for main users was organized after Easter. The schedule for configurations was also agreed on. Software modifications were divided into four stages including the following features:

1. Accounts, Contacts, User access rights
2. Sales processes and sales projects
3. Sales and management support tools and reports
4. Marketing functionalities

However, since marketing functionalities would have needed larger changes in other features as well, it was thought best to leave them for future development. Each stage included three workshops; the start, status check, ending. The first two stages were completed before the holiday season in July and the third stage between August and September 2014.

TABLE 1. Roll-out order by the business unit

Time	Implementation unit
December 2014	Finland, Denmark, Germany
January 2015	Austria
February 2015	Sweden, Norway, Slovakia, Gulf, Saudi-Arabia
March 2015	Estonia, Latvia, Lithuania, Italy

The final testing was executed in October 2014. This testing included one testing day, two weeks of configuring the features into a correct form and the final testing day. The system roll-outs started in November 2014 and Dynamics CRM was introduced for the three main units by the end the year. (CRM Project Manager 2016.) TABLE 1 shows the roll-out order of the business units, which are also part of the online surveys' participating population.

Starting to use a CRM system requires data importing into the system. Since companies usually have their customer data in some other location, it needs to be transferred to the CRM separately. Dynamite CRM is Company X's own creation for managing these data transfers. It is created by the CIO of the company to avoid confusion and ease the process among users. This sub-chapter is included to the study because Dynamite CRM is an important part of the whole CRM implementation in Company X, and also, to show to the reader the basic idea of Dynamite CRM's functions. Some of the survey respondents were part of the data transfer and therefore, questions concerning the data transfer were added into the survey.

Dynamite CRM is an application built with Microsoft Access, which is Microsoft's database management software. The company has 30 offices around the world and several of them are using enterprise resource planning software, Microsoft Dynamics AX. From each unit, there are one or two contact persons who have been trained to use Dynamite CRM during the implementation since local data knowledge is needed. FIGURE 6 was created to help understand the data transfer as a whole and to get clearer picture of all used software.

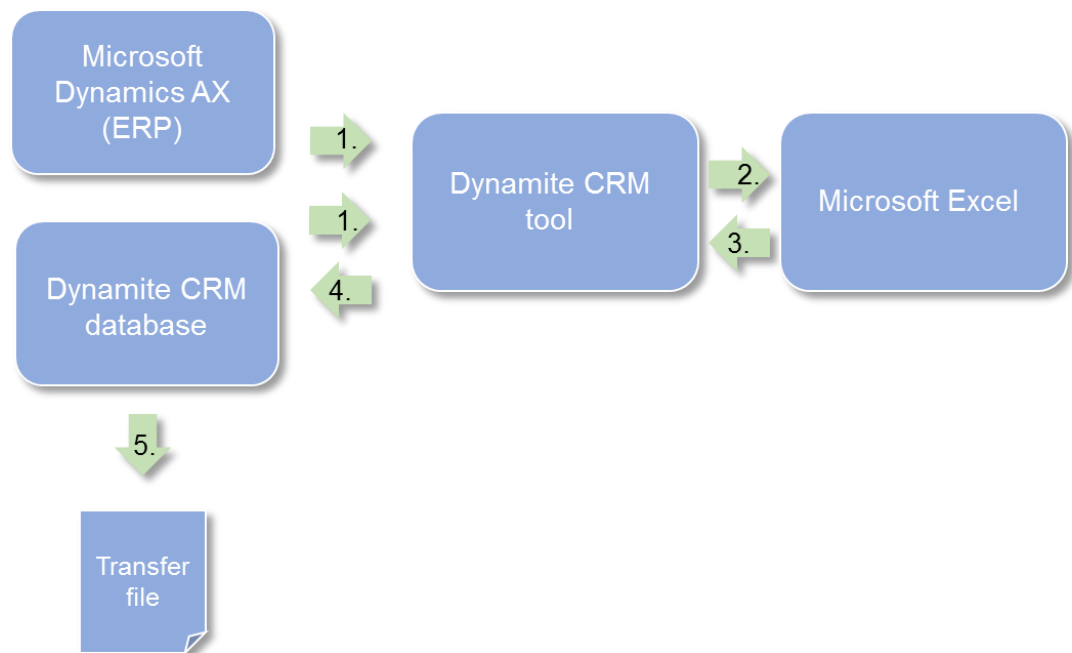


FIGURE 6. Data transfer process (CIO of Company X 2015)

Customer data is exported from Dynamics AX to the Dynamite CRM where the data can be checked through and then saved, step 1. If there are some changes needed, the data is exported to Excel, step 2. When the file has been edited it is again imported to Dynamite CRM, step 3. The tool will check that there are no errors or missing information. Once checked and if no errors are found, the file will be saved into Dynamite CRM like step 4 shows. It is also possible to fetch already saved data from the database, step 1 from database to Dynamite CRM tool. These are shown in Dynamite CRM as handled customers.

This will help in editing possible new data found in Dynamics AX. Once all the data is in the Dynamite CRM database, the transfer file for CRM import is exported, step 5. (CIO of Company X 2015)

4.2 Survey Design and Formulation

Since the population participating in the survey was spread all around Europe, the fastest way to execute the questionnaire was to do it as an online survey. Survey Monkey has become one of the most popular survey applications in the world (Survey Monkey 2016), and since Company X had licenses for the system with upgraded features, was Survey Monkey an obvious selection for the research tool. The online survey was sent to the users in those offices, which had used Dynamics CRM for over a month.

The main focus in structuring the survey is to keep questions simple, be specific and use short questions, and deliberate the questions' quantity and order. The ideal outcome is reached with questions, which will provide workable answers. (Hirsjärvi, Remes & Sajavaara 2010, 202.) Grouping questions into sections will also make answering more convenient and effortless. (Johnson, H. 2016). This survey was divided into four different sections based on the phases of the actual implementation process: background, CRM implementation, usage, and prospects and feedback. The survey itself included 26 questions in total and the structure was developed together with Company X's contact person based on the feedback given in various meetings. The final version was approved by Company X's Vice President of Sales and Marketing. The main goal of the survey was to discover user likes and dislikes and areas that need critical improvements.

Survey questions (Appendix 1) included closed ended, rating scale and open-ended questions. Closed ended questions are the best way to receive data, which can be analyzed easily. However, rating scale questions enable measuring of the answers and makes it more convenient to compare results between two offices, for example.

Open ended questions can be hard to analyze, but they offer a better insight of the situation and can offer important aspects as well. (Johnson 2016.)

The first question section was for background information, which will help to categorize survey results, for example, by the office. This question page included four questions such as what is user's business unit and sales role in the company, CRM system experience in general and estimated time in years in a position where CRM has been needed.

The second question section studied the actual implementation phase with eight questions. These questions were to find out how the company had informed the users about the upcoming implementations, were there enough system training organized, and if users had the knowledge to use CRM system after implementation or not. This section also included two questions concerning data implementing tool, which was created by the CIO of the company. This tool is called Dynamite AX and it was introduced in chapter 4.1 of this study. First open-ended question can be found in this section as well.

The third section consisted of nine questions about the usage: how often CRM is used, for what mostly and if the users have benefited from it at all. This section also included quality questions concerning the CRM support, meaning mainly the given IT support. The last five questions formed the last section of the whole survey: prospects and feedback. There were three open-ended questions concerning new wanted features, needed changes and the feedback question about CRM in general. Two remaining questions were to find out the potential of a new Marketing tool in CRM and how much CRM system will improve sales in overall. All the questions can be found in Attachment 1.

4.3 Data acquisition process

In this chapter, the data acquisition process is explained. The process included planning, promotion, actual launching and sending reminders and finally, it ended with closing the survey. The whole survey process lasted over a month although the survey itself was open only for 16 days.

FIGURE 7 demonstrates the process from planning till the closing of the survey.



FIGURE 7. Data acquisition process

Every second week, Company X releases a Sales Newsletter, which includes information concerning upcoming and ongoing projects, updates from products managers and developments in sales. Sales Newsletter is a convenient way to advertise anything inside the company and to reach employees working in foreign offices as well.

Therefore, the survey was promoted two times in Sales Newsletter: first time in the Newsletter published on 18th of May 2015 to inform every participating employee of the survey's purpose, and second time the day before launching it in 1st of June 2015.

While the survey was being promoted, last editions were still made, as a result of test using. Pre-testing is important to avoid possible malfunctions and to get feedback of the survey's question layout (Johnson, 2016). The survey was tested among a few main users to see that page skip logics and everything else would work as planned. After final pre-tests were completed and a couple of glitches were fixed, the survey was ready to be launched.

On the 2nd of June 2015 the survey was sent via Survey Monkey to the participating population of 169 Dynamics CRM users. The goal was to reach overall response rate of 50 %. High response rate is worth striving for to receive more trustworthy results (Johnson, 2016). To reach as high response rate as possible, there were personal reminders sent twice during the survey period: first on June 8th and second on June 15th. The survey was closed on June 17th. The overall response rate was 55 % by receiving 93 answers in total.

4.4 Data Analysis

Data analysis shows readers the main observations based on the survey results. Since survey questions were already divided into sections, it was clear to use the same division when analyzing the answers. Different kinds of diagrams are used to demonstrate division of the answers. In the end of each section there are small conclusions of the results with deliberations.

4.4.1 Background questions

The survey was sent to 14 units, meaning mainly the offices located in different countries. These are listed in FIGURE 8, which also illustrates the division of the respondents. Company X Group includes those employees, who are working mainly in administrative positions in the organization. First CRM implementations were completed in Finland, Germany and Austria, which are the largest offices in the company as well. Therefore, these offices also have the highest answering percent for the survey. 25 of 93 answers were given by Germans.

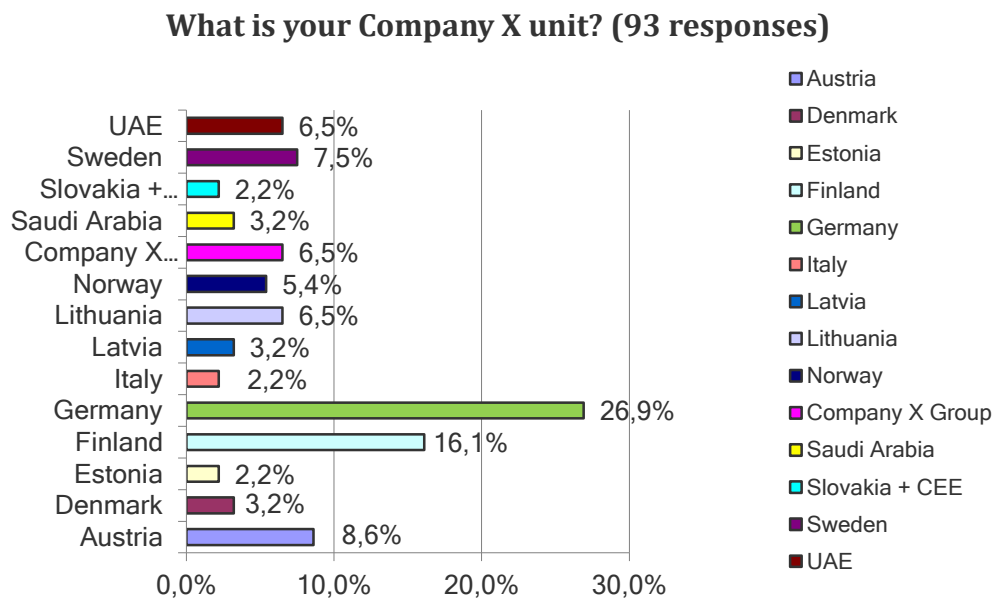


FIGURE 8. Company X business unit division

The second background question concerned the respondent's sales roles in the company. This question seemed to be surprisingly challenging, since over 24 % chose to belong to the group "Other" instead of classifying themselves to engineers, management, support or sales persons.

(FIGURE 9) The "Other" answer included following specifications: technical support (4), sales (3), administrator (3), managing director (3), project leader (3), accountant (1), marketing (1), technical designer (1), quality management (1), trainee (1), none (1) and all of them (1).

Some of these answers could have been relocated under the four main options, but were now left as “Other” to respect the original survey results.

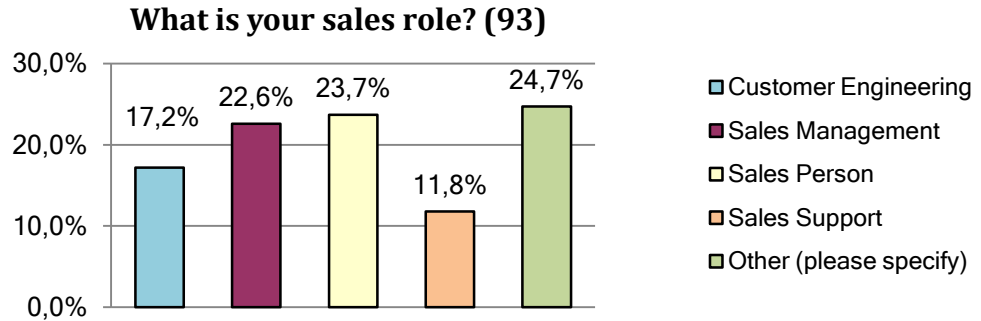


FIGURE 9. Sales role in the company

A third of the users had worked less than a year in a position where CRM is actually needed. The same result was given from those who have been in the position over 4 years. (FIGURE 10.) This question gives an impression of how long there has been a need for developing CRM system in the organization.

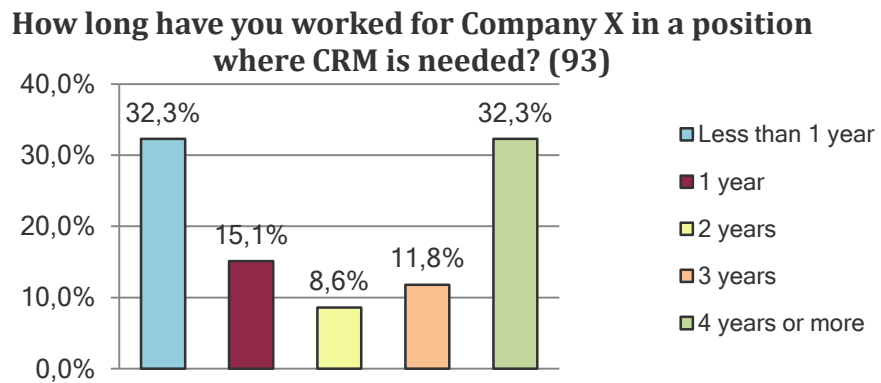


FIGURE 10. Years in a position where CRM is needed

The fourth question resulted important numbers concerning the experiences of CRM software. 72 users had never used CRM software before (FIGURE 11), which means that four out of five users were dealing with a completely new software.

One fifth had some kind of knowledge of CRM, and had used software like SAP, Hansa World, Axapta and Excel. Only one person mentioned being familiar with Microsoft Dynamics CRM.

Have you worked with other CRM softwares before?

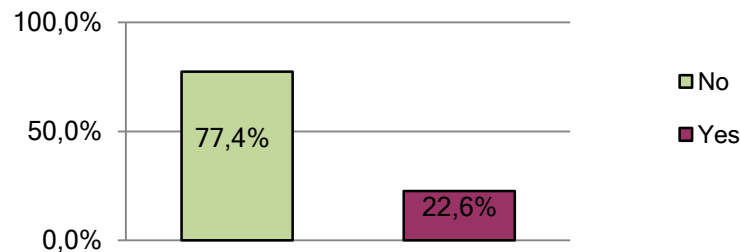


FIGURE 11. Earlier experiences of CRM software

Based on FIGURE 8, a majority of collected answers and opinions were given by German, Finnish and Austrian users. These users have also used Dynamics CRM the most being the first offices where CRM implementations were executed at. Therefore, these users have already gained a good knowledge of the software to form valuable opinions. These first questions also brought out that almost four out of five had not worked with CRM software before (FIGURE 11). Such fact needs to be recognized by the company, so that enough training sessions and other guidance can be organized to enable as smooth implementation as possible.

4.4.2 CRM implementation phase

CRM training sessions were organized for each unit by the organization's two employees as trainers. Question five was about the CRM implementation schedule and notifying about the actual implementation dates. Almost two out of three answered that notifications about the CRM implementation were not clear at all or that they were quite clear. Same kinds of results were shown when asking how successful users found the actual training sessions. Over 70% of the respondents felt that the content, duration and emphasized areas of the training session were quite successfully executed. Eight users had not participated in these trainings and therefore skipped questions concerning training sessions giving 85 answers in total. (FIGURE 12.)

Not at all successful	Quite successful	Very successful	Extremely successful	Total
11.76% 10	70.59% 60	16.47% 14	1.18% 1	85

FIGURE 12. Training session's satisfaction rates

Question five wanted to find out how clear it was for the users, when the CRM implementation would take a place. Basically this question was trying to figure out how the CRM team managed to inform users about upcoming training sessions and possible pre-tasks, for example, data transfers into the system. Majority of the respondents felt that the implementation date and schedule was quite clearly notified. Only four had an extremely clear image of the schedule. (FIGURE 13.)

Not at all clear	Quite clear	Very clear	Extremely clear	Total
12.36% 11	51.69% 46	31.46% 28	4.49% 4	89

FIGURE 13. Information about CRM implementations time and place

In chapter 4.1 the data transfer system called Dynamite CRM was introduced. Each subsidiary had their local data in some other form, and since this data needed to be transferred to CRM, was Dynamite CRM under heavy use during the implementations. Not all users dealt with data transfers, but those who did, were asked their opinions concerning the training and usability. In total 27 of all 93 respondents had used Dynamite CRM. Training for the system could have been better based on the respondents' answers. Almost 20 respondents found the system training only quite successful. However, only three of all users (FIGURE 14) thought that the system was very difficult to use. Otherwise, the respondents found the system very easy to use.

Not difficult at all	Quite difficult	Very difficult	Extremely difficult	Total
38.46% 10	50.00% 13	11.54% 3	0.00% 0	26

FIGURE 14. Dynamite CRM difficulty to use

Question ten was for finding out how well the respondents were able to use CRM after the training sessions. Results show that only 15 users were able to use the software either very well or extremely well (FIGURE 15). Since 70 users felt that the know-how was nonexistent, it can be concluded that there probably was not enough training sessions offered for the users.

Not at all well	Quite well	Very well	Extremely well	Total
23.53% 20	58.82% 50	15.29% 13	2.35% 2	85

FIGURE 15. Know-how to use CRM after the training session

Even though training sessions did not seem to cover enough or more sessions would have been needed, the understanding of how CRM should be used was clear: 80 % of the answers were 'Yes'. Question eleven also had a possibility to leave a comment concerning these training sessions. The respondents stated that they only have an overview about the usage, but many options are still unknown. Extra training sessions were something that were highly requested by the users. Comments were also made about the user friendliness of the software.

Question 12 was an open-ended question for other comments and concerns about the implementation. The respondents criticized preparations of the training sessions. For example, some offices were still importing data into the system when training had already started, since the use of data transfer system, Dynamite CRM, was unclear.

Also the main usage of the software was not aligned well and therefore users were unsure on how to use the software correctly.

This section's survey results show that the respondents would have wanted more training to use the software. Also the whole implementation schedule was found unclear and preparations left to the last minute. It was stated in chapter 3 that user training is one of the key points towards successful CRM implementation, and therefore, these results are concerning. For future implementations it is obvious to increase the quantity of training sessions, provide users with simple guidance package as a pre-study, make sure that preparations like data transfers are completed early enough and pre-test the software.

4.4.3 Usage

The third section included 9 questions concerning the usage and technical support after the software roll out was completed. The first question of this section was about the basic usage of the software. Results showed that over a half of all respondents uses CRM every week. (FIGURE 16.) Seven users answered that they had not used the software since the training, which of course raises a question, if they need the software access at all. After all, every user license costs a lot of money.

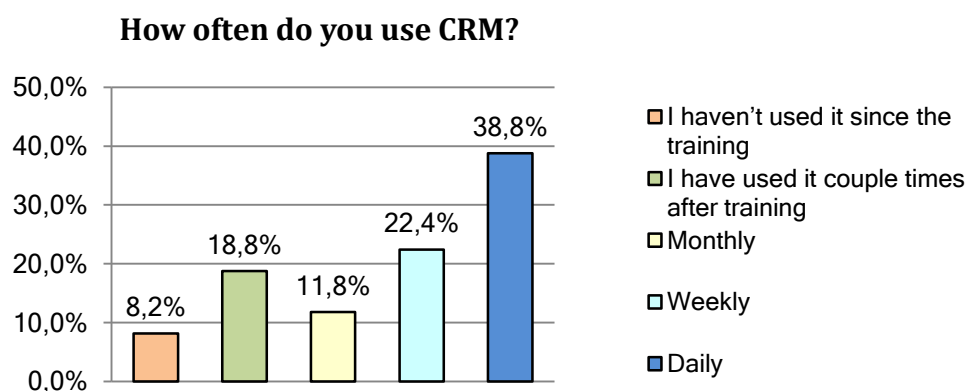


FIGURE 16. Usage of the software

The second question concerning the usage wanted to know for what users are mainly using the software. Users were allowed to give a maximum of two answers and over half of all respondents said that they use it for working with opportunities. The second most popular choice was creating and maintaining accounts and contacts, which collected 32 clicks.

The third highest choice was working with CRM activities with 23 clicks. However, because CRM is a versatile software and not all functions could be listed in one question, choice 'Other' was added with a comment box. This choice collected 12 specified answers mainly including comments like "not using it, only help personnel to use it" and "all of the options above are needed daily". Only 81 respondent answered to this question, which can be caused by the fact that there were a couple of offices who had used CRM just over a month, and the usage is still in the starting point. However, the top three was so clear that the result can still be regarded as reliable.

The next question, 15th on the survey, asked how much users have benefited from using CRM. As we can see from FIGURE 17, altogether 66 respondent feel like they have not benefited from it at all or just quite a lot. Only 1 person feels like CRM has been extremely useful since implementation.

Not at all	Quite a lot	Very much	Extremely much	Total
44.71% 38	32.94% 28	21.18% 18	1.18% 1	85

FIGURE 17. How much users have benefited from using CRM

The question itself does not show why the respondents feel as they do and for that reason they were allowed to comment on their answer with a couple of words. Comments were not mandatory, but still 27 respondents left one. These comments were divided fairly evenly in half including negative, but also positive feedback.

Users seemed satisfied with CRM's functionalities and how it is possible to follow up projects and have quickly an overview of ongoing projects. Some said that using CRM has even helped them understand other software better. Users also feel that documents and customer data is now more clearly shown.

Negative feedback is mainly based on the slowness of the software or how confusing and disorganized the whole software feels like. A couple of comments even stated that CRM is only "double work" and "more a punishment than a benefit". Both negative and positive feedbacks did have one common statement: the software still needs some improvements to meet the user friendliness.

The next three questions were asking about technical problems during the use, what kinds of problems had been faced and how well these problems had been solved by technical support. 59 users of 85 said that they had faced technical problems during the use. (FIGURE 18.)

Has there occurred any technical problems during the use?

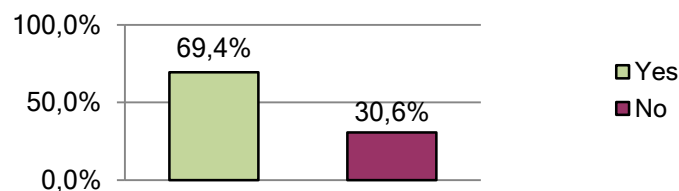


FIGURE 18. How many users had faced technical problems during use?

How many times users actually needed to contact technical support - results divided fairly evenly in half. A little bit over half said that they used technical supports' help only once or not at all. However, 13 respondents had needed help more than 5 times. (FIGURE 19.) The reason for asking help varied from CRM functionalities to forgotten passwords. The main reason for the need of help was that CRM was not working or some kinds of error messages had occurred. Also failing CRM's installation caused trouble for the users.

How many times you have needed to contact IT department or administrative person for support?

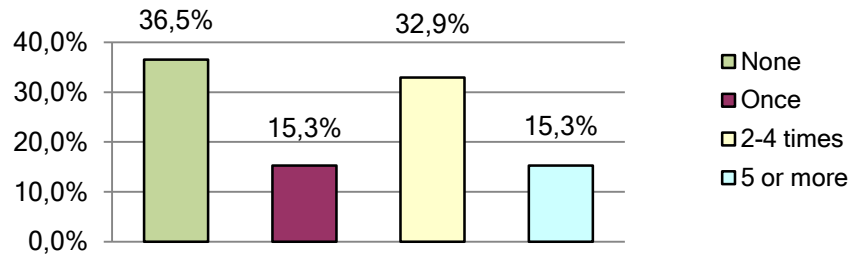


FIGURE 19. Times of contacting technical support

Questions 19 and 20 also dealt with the quality of technical support since it plays quite an important role in CRM implementations. Users were asked how fast their problems were recognized and solved, and how they found the help in overall. Over two thirds had received help in the same day or in a couple days. Eight users had waited more than one week and three users received help after a month or later. However, overall support readiness seems to be fairly fast, and when clearly over half found the service good or excellent it can be said that Company X's technical support has been working well during the process (FIGURE 20). The amount of answers was 54 since those who had not had the need to ask for support automatically skipped questions concerning the help's quality.

Poor	Fair	Good	Excellent	Total
12.96%	29.63%	50.00%	7.41%	
7	16	27	4	54

FIGURE 20. Technical support satisfaction rates

The last question of this section was also a quality question, but about the usage in general. Over a half felt that using CRM is poor or fair. Only one user felt it to be excellent. All in all, answers varied between fair and good leaning little bit more on the negative side. (FIGURE 21.)

Poor	Fair	Good	Excellent	Total
8.24% 7	49.41% 42	41.18% 35	1.18% 1	85

FIGURE 21. Using CRM satisfaction rates

Like Oksanen (2010, 25) had stated, it is important that 4 out of 5 users are actually using the software after two years. These survey results show that usage is still behind of this goal. It is possible that the quantity of the training sessions has something to do with the results, since without a proper know-how, it is challenging to start anything new by oneself. However, over half said that they use the software and mainly to work with properties, maintain customers and contacts, and work with CRM activities. Even though over half of the respondents are already using the software actively, the results show that they do not feel they benefit from the usage at all. This might be caused by the fact that the software has not been in use long enough that it would actually show major benefits in this early phase.

Over half of the users had asked for support for IT problems. Such a high number shows that pre-testing was not probably done correctly. However, overall IT support was found good and functional. These results also show the importance of pre-testing the software before the implementation and usage. Perhaps by proper testing Company X could have decreased the amount of problems and made the early phase usage smoother for the users.

It was also interesting to see how opinions on the usage in general had divided so fairly in half. This can maybe be explained by the different levels of experiences with the software. Even though all users had used the software for over a month, like the participating population was limited, it is still little compared to those offices, who had gained knowledge from five months.

However, if less problems would have emerged during the first weeks of usage, maybe opinions of the usage would be more positive as well.

4.4.4 Prospects

In the prospects section, respondents had a chance to share what they would like to change in the existing CRM. This section included five questions, where three of them were open-ended questions and two rate scaling questions.

The main issue, which was brought up by the respondents, was about the speed of the software. According to users the software should be faster in action. Also integrations between other software should work more effectively. Since the software is slow, respondents feel that they are losing valuable working time for just waiting the software to load. One suggestion was that instead of using several software, one all-encompassing would be more useful. Users would also like to simplify the interface of the software. At the moment it feels complicated to use and internalize, and because of this it does not feel fully functional and is not a convenient software for the projects. The system should be “easier, logical and transparent”, like one comment stated.

Question 23 asked what kinds of new features the users would like to have in CRM in the future. The respondents’ main concern was the software’s easiness of use. For example, a few comments pointed out that a few dashboard features should be automatically available, and not have to be formed manually, like it is now.

Many respondents pointed out some of the negative aspects. These included concerns of the integrations and CRM’s basic functions. Some were troubled over the limitations of the basic functions stating the following:

“I would be happy, if it would work like it should work, and it should have the functions, which have been promised and still not working.”

It was also interesting to see how the respondents felt they could benefit from CRM and whether it would actually improve their sales work? As FIGURE 22 shows, clearly over half of the users felt that CRM would not improve sales work that much.

Not at all	Quite a lot	Very much	Extremely much	Total
32.14% 27	45.24% 38	22.62% 19	0.00% 0	84

FIGURE 22. Benefits of the CRM usage

The use of marketing automation makes processes, which would otherwise be performed manually, much more efficient. Within the CRM system it enables dividing and classifying customers by using, for example, factors like Customer Segment and Interest Areas. Marketing automation also offers integrated tools, which make it convenient to inform potential customers of business products and services through emails, social media and websites, for example. There is no need for separate newsletter tools once Marketing Automation is used. (Marketing Manager 2015.) Since this kind of feature could be added into the system, it was essential to find out users' opinion of such possibility. Therefore, 25th question was about how relevant respondents see Marketing Automation in CRM. FIGURE 23 shows the division of answers. Almost a third of respondents thinks that such feature would be very important or even extremely important for business. However, the majority do not see Marketing Automation that important for Company X's business.

Not important	Quite important	Very important	Extremely important	Total
13.10% 11	47.62% 40	28.57% 24	10.71% 9	84

FIGURE 23. Relevance of Marketing Automation in CRM

The last question of the whole survey was left for open feedback. Many users see that CRM has potential, however it currently feels unfinished. It was also suggested that the implementation was executed in too early a phase in comparison to the capabilities and readiness of the software. Therefore, many users have stated that the current issues with the software should be corrected, before using the software to its full potential becomes a possibility.

5 CONCLUSION

The conclusion chapter is for introducing the findings of the thesis, answering to earlier stated research questions and discussing the validity and reliability of the study. In addition, suggestions for further research are stated.

5.1 Answers to Research Questions

TABLE 2 provides short answers to sub-questions, which were stated earlier in order to help answer the main research question: ***How did Company X succeed in CRM implementation from the users' point of view?***

TABLE 2. Answers to sub-questions

What is the definition of CRM?	CRM (Customer Relationship Management) is based on the idea of customer-oriented business strategy. CRM systems support business in building long-term relationships with customers being the base for customer information, contact persons and projects.
What are the CRM implementation phases?	<ol style="list-style-type: none"> 1. Developing CRM strategy 2. Building CRM project foundations 3. Needs specification and partner selection 4. Project implementation 5. Performance evaluation

<p>What are the requirements for successful CRM software implementation?</p>	<p>CRM implementation requires a well-organized management, proper training sessions for employees, efficient technical support and understanding towards cultural differences and language barriers what might occur during the process.</p>
--	---

As TABLE 2 concludes, CRM systems are tools for adapting the strategy to the organization's business. These systems help to keep and maintain customer data, report about project situations and adapt the input data to develop business to suitable directions.

TABLE 2 also shows that the whole CRM implementation process includes five steps, where the fourth step is the actual software execution phase. Before organization can continue to the fourth step, several preparations must be executed during the first three steps. These preparations include, for example, situation analyzing (SWOT analyses), executing CRM education, establishing goals and identifying resources and estimated costs for the project. Also CRM project team will be published and final vendor selections are made. When it becomes time for the implementation to be executed, organization should have completed technology customizations and tracked all existing problems before any roll out is conducted. Step fours' main purpose is to test the prototype well, so that all the fouls can be detected in time. To succeed in CRM implementation, all the implementation process phases should be followed in detail.

However, there are some other critical requirements as well, such as well-organized management and proper training sessions for future users. These are also included in TABLE 2.

The main research question was as the TABLE 3 shows.

TABLE 3. Answer to the main research question

<p>How did Company X succeed in CRM implementation from the users' point of view?</p>	<p>Based on the survey results, the implementation was executed in too early a phase in comparison to the capabilities and readiness of the software. For future implementations it is obvious to increase the quantity of training sessions, provide users with simple guidance package as a pre-study, make sure that preparations like data transfers are completed early enough and pre-test the software.</p>
---	--

Users' point of view was studied through user satisfaction survey. The survey was conducted as an online survey, since a majority of the respondents were working in Company X's foreign business units. This way respondents were reached faster and easier. The survey collected 93 answers giving a final respondent rate of over 55 %.

Questions were divided into four sections: background, implementation, usage and prospects and feedback. According to background questions, four out of five respondents had no previous experience of CRM software. Thus, user experiences of CRM software were low or negligible.

Questions about implementation showed that there should have been more training sessions in order to provide users with proper know-how for the individual use.

Answers also indicated that preparations like data transfers should have been completed early enough and the software functions pre-tested before adapting the software into Company Xs' daily use. Nevertheless, Dynamics CRM is seen as a potential sales tool among the users.

5.2 Validity and Reliability

This thesis included a theoretical part and empirical part. Secondary data for the study was collected by using related literature, various articles and reliable web pages. Primary data was based on an online survey, which was sent to chosen CRM users in the company. The participants were chosen based on the software usage time. The aim of the research was to find the answer to the main research question.

Three sub-questions were also stated and based on the information accumulated from the theoretical and empirical parts of the study, it can be summarized that the goal was met and all research questions were answered. Based on aforesaid, the study can be considered as valid. In addition, if the survey was executed again, it would yield similar results. Therefore, it can be stated that the study is reliable.

5.3 Suggestions for Further Research

Now that time has passed and the survey respondents have used the software for a longer time, it would be interesting to know, how they feel about the usage today. By modifying the survey, it would also be possible to study, how the rest of the units, which were limited out, experienced CRM implementations in general.

These results could be compared to this research to see, if there were any improvements or developments during the project. Since technology is developing and there will be more similar software implementations in the future, the possibility of creating a process managing check list should be studied as well.

6 SUMMARY

This thesis was commissioned by a globally known metal industry supplier Company X. The aim of the thesis was to find out how the company's CRM implementation process succeeded from employees' point of view.

The thesis was structured to introduce basic concepts of CRM and CRM as a system. Since the main focus was on the system implementation, also the implementation phases were introduced in the theory part of the study. Primary data for the study was collected through an online survey and interviews. In order to analyze the survey results, requirements for successful implementation needed to be studied. These were then introduced in the third main chapter.

Company X's CRM implementation process was briefly introduced as a part of the empirical research chapter. Also the survey introduction and results were covered under the same chapter. The data acquisition process was illustrated in figures and the data analysis was divided into four sections to facilitate the analyzing process.

Finally, it can be stated that the study reached its objectives, since the main research question and all sub-questions were answered. The study showed that future CRM users need to be paid more attention to in upcoming implementations and that Company X should invest properly in training users.

REFERENCES

Written references

Becker, J.U., Greve, G., Albers, S. 2010. How to Prevent CRM Implementations from Failing. [Referenced 10.3.2016]. *New Strategies*, 5/2010, 34-64.

Buttle, F., Maklan, S. 2015. *Customer relationship management – Concepts and technologies*. 3. revised edition. New York: Routledge.

Hirsjärvi, S., Remes, P., Sajavaara, P. 2010. *Tutki ja kirjoita*. 15-16. revised edition. Hämeenlinna: Kariston Kirjapaino Oy.

Klimanov, D., Frolkina, E. 2015. The Impact of CRM System Use on Companies Customer Understanding: The Case of the Russian Ophthalmology Market. [Referenced 25.1.2016] *Trziste* 27/2015, 75 – 92.

Oksanen, T. 2010. *CRM ja muutoksen tuska*. Helsinki: Kariston Kirjapaino Oy.

Pinto, J.K. & Slevin, D.P. 1987. Critical Factors in Successful Project Implementation. [Referenced 18.3.2016]. *IEEE Transactions on Engineering Management* 34/1987, 22-27

Piskar, F. & Faganel, A. 2010. A Successful CRM Implementation Project in a Service Company: Case Study. [Referenced 18.3.2016]. *New Strategies, Organizacija* 42/2010, 199-208

Rigby, D., Reichheld, F., Scheffer, P. 2002. Avoid the Four Perils of CRM. *Harvard Business Review*: 2002.

Saunders, M., Lewis, P., Thornhill, A. 2012. *Research Methods for Business Students*. 6. Edition. UK: Pearson PLC.

Steel, M., Dubelaar, C., Ewing, M.T. 2013. Developing customized CRM projects: The Role of Industry Norms, Organizational Context and Customer Expectations on CRM Implementation. [Referenced 10.3.2016]. *Industrial Marketing Management* 42/2014, 1328-1344.

Tileaga, C., Nitu, O., Nitu, C.V. 2013. Customer Relationships Management in Organizations. [Referenced 18.3.2016] *Procedia Economics and Finance* 6/2013, 399-404

Electronic references

Ahonen, M. 2016. Suuri CRM-vertailu: Paras asiakastietojärjestelmä edullisesti. [Referenced 6.3.2016]. Available at:
<http://vinkkisolutions.com/fi/arkistot/960>

Buttle, F. 2009. Customer relationship management – Concepts and Technologies. 2. Revised edition. E-book. Available:
http://www.academia.edu/6262473/Customer_Relationship_Management_Second_Edition

Company X. 2015. [Referenced 13.5.2015]. Available:
www.CompanyX.com

Elinkeinoelämän keskusliitto, 2016. Perustietoja Suomen taloudesta. [Referenced 28.3.2016]. Available at: <http://ek.fi/mita-teemme/talous/perustietoja-suomen-taloudesta/>

Johnson, H. 2016. 10 Tips to Improve your Online Surveys. Survey Monkey. [Referenced 13.3.2016]. Available at:
<https://www.surveymonkey.com/blog/2012/04/13/10-online-survey-tips/>

Jyväskylän yliopisto. Empiirinen tutkimus, 2015. [Referenced 28.3.2016]. Available at:
<https://koppa.jyu.fi/avoimet/hum/menetelmapolkuja/menetelmapolku/tutkimusstrategiat/empiirinen-tutkimus>

Kothari, C.R. 2004. Research Methodology – Methods and Techniques. Second revised edition. [Referenced 7.3.2016]. Available: http://202.74.245.22:8080/xmlui/bitstream/handle/123456789/45/C.R._Kot_hari_Research_Methodology_Methods_and_Techniques__2009.pdf?sequence=1

Lambert, D.M. 2010. The Customer Relationship Management Process. [Referenced 25.1.2016]. Available at: <http://www.ijlm.org/booksamples/ch.2.pdf>

Microsoft Dynamics. Microsoft. 2015. [Referenced 28.8.2015]. Available: <http://www.microsoft.com/en-us/dynamics/default.aspx>

Payne A. & Frow P. 2006. Customer Relationship Management: from Strategy to Implementation. Journal of Marketing Management. [Referenced 9.3.2016]. Available at: <http://search.proquest.com.aineistot.lamk.fi/docview/195890848/>

Pupovac, L., Zehetner, A., Sudarevic, T. 2012. The Ways of Using CRM Systems; the Survey of Literature. [Referenced 21.1.2016] Available at: <http://www.ef.uns.ac.rs/mis/archive-pdf/2012%20-%20No2/MIS2012-2-3.pdf>

S-Pankki. 2015. Suomen heikko taloustilanne jatkuu vuonna 2015. [Referenced 21.5.2015]. Available: <https://www.s-pankki.fi/fi/tiedotteet/2014/suomen-heikko-taloustilanne-jatkuu-vuonna-2015/>

SurveyMonkey. 2015. [Referenced 26.6.2015]. Available at: <https://fi.surveymonkey.com/>

Talpau A. & Boscor D. 2011. Customer-Oriented Marketing – A Strategy that Guarantees Success: Starbucks and MC Donald's. [Referenced 1.2.2016]. Available at: <http://webbut.unitbv.ro/BU2011/Series%20V/BULETIN%20V%20PDF/09%20talpau%20boscor%201%20BUT%202011.pdf>

Oral references

CIO of Company X. 2015. Dynamite AX. Interview 28.5.2015.

CRM Project Manager. 2016. CRM implementation in Company X.
Interview 4.4.2016.

Marketing Manager of Company X. 2015. Marketing Automation. Interview
1.6.2016.

APPENDICES

APPENDIX 1. Survey questions

1. Background

- What is your Company X unit?
- What is your sales role?
- Microsoft Dynamics CRM is a customer relationship management software. How long have you worked for Company X in a position where CRM is needed?
- Have you worked with other CRM software before?

2. CRM implementation

- How clear it was for your office when the CRM implementation would take a place?
- Company X created an own software for uploading customer and contact data to the CRM during implementation phase. The software is called Dynamite CRM. Where you using the Dynamite CRM when data transfer was performed?
- How successful was the training for the use of Dynamite CRM?
- How difficult it was to use Dynamite CRM?
- Microsoft CRM training session was organized for each office. How successful did you find the session? (content, duration, emphasizing essential areas)
- After the training, how well were you able to use the CRM?
- After the training, did you have an understanding how CRM should be used?
- Other comments, questions or concerns of the implementation?

3. Usage

- How often do you use CRM?
- For what do you use CRM the most? Select max 2.
- How much have you benefited from using CRM?
- Has there occurred any technical problems during the use?
- How many times you have needed to contact IT support or administrative person?
- What was the reason for asking support?
- How fast was the problem solved?
- How did you find the help?
- How do you find the usage of CRM in general?

4. Prospects and feedback

- Is there something you would like to change in the existing CRM?
- What kind of new features would you like to have in CRM in the future?
- How much will CRM improve your sales work?
- The use of marketing automation makes processes that would otherwise have been performed manually much more efficient and saves time. Marketing Automation within our CRM System enables using such factors as Customer Segment and Interest Areas to divide and classify customers. It offers integrated tools which makes it easy to inform potential customers of business products and services through newsletters, emails, social media, websites etc. It also allows easy lead generation from newsletter campaigns, fairs and other systems. No separate Newsletter Tools like Apsis will be needed once Marketing Automation is in place. How relevant do you see it in CRM?
- General feedback about the CRM?