The challenges of CRM implementation for Russian enterprises

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Thanks to the fast-evolving technology and globalization, the business scene is expanding at a high pace. There is more competition between businesses, which raises the customer’s expectations to unprecedented levels as well as customer acquisition costs. Therefore, for a company it is imperative to implement a CRM system to organize maintain a good relationship with customers and to facilitate interactions between Businesses and their customers.

After the Dissolution of Soviet Union, Russian enterprises are now facing challenges in implementing technologically advanced tools (such as CRMs) to meet the standards (operational activities, financial indicators, supply chain) of first tier economies like the US or Europe.

The aim of this thesis is to review, analyse and compare different CRM systems to help us identify issues that challenges enterprises when implementing a new CRM system. Furthermore, a study of Softline experience of implementing their new system will help confirm our findings. This research will help us construct a full procedure on how an enterprise should implement a new CRM system minimizing challenges, risks and cost overruns.

**Keywords**

CRM, Salesforce, Sales automation, implementation, CIS
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1 Introduction

With the exponential growth of internet, globalization and education of customers, there has been an increase in competition intensity amongst organizations shifting the business world from transactional marketing to a relationship marketing approach. (Payne, 2009)

With this shift, organizations are focusing on building relationships with customers to avoid losing them to other competitors which has made customer relationship management (abbreviation CRM will be used in the thesis) software crucial for an organization’s success. In 2010, the CRM industry was valued at 14 billion dollars, in 2017 it was valued at 36 billion which illustrates the rapid growth of the CRM industry. (CRM Blog: Articles, Tips and Strategies by SuperOffice, 2018).

The industry of CRM is driven by technology, which means that with the increase of technological innovations, CRM will continue to evolve. We are seeing a current significant change in CRM systems as we are entering a cloud-powered generation that will migrate CRM software to the cloud, making CRM software lighter, faster and cheaper. (Lazar, 2017) Therefore, to stay competitive, companies have no other choice but to adopt and implement a CRM software.

However, a common issue for software makers is adoption i.e. getting employees to use the software. The usage rates can be determined by multiple factors (e.g. user friendliness, software design). According to Forrester Research who surveyed 133 organizations using CRM, almost half of CRM projects failed, and 22% of those are due to people-related issues. (Band, Leaver and Magarie, 2009)

As much as there are benefits to adopting a CRM software to a company, it also presents some risks that we are going to go through in this thesis. CRM, being a relatively new concept, has more than one definition. According to Adrian Payne, CRM could be thought of at three levels, the implementation of a technology solution, an implementation of integrated customer-oriented technology solution, and a strategic approach to managing customer relationships. (Payne, 2009)

In this thesis conducted in a partnership between Maksim Kamenskii (SAMPO 16) and Adam Ifrene (SAMPO 16) and commissioned by Softline LLC, the definitions of CRM are going to be explored in order to identify and concretize the reasons behind the failure of CRM projects and allow Softline to tackle CRM implementation issues with a clearer view of risks and areas of difficulties. As a CRM distributor, Softline is looking to explore the
CRM-related challenges Russian organizations are facing in order to develop a better customer service that would help reduce CRM implementation risks. Therefore, the objective of this thesis is to cover and assess factors that could potentially create failures in a CRM implementation, verify the significance of these factors in the Russian market and give solution suggestions. This objective brought us to the research question: What are the main reasons behind the failure of Russian enterprises in implementing Customer Relationship Management System and how can they be successful in the future?

1.1 Glossary

*Data standardization* is the critical process of bringing data into a common format that allows for collaborative research, large-scale analytics, and sharing of sophisticated tools and methodologies. (Ohdsi.org, 2018).

*Data mart* is a repository of data that is designed to serve a community of knowledge workers. Data marts enable users to retrieve information for single departments or subjects, improving the user response time. (SearchDataManagement, 2018).

*A mainframe* is an ultra-high-performance computer made for high-volume, processor-intensive computing. They are typically used by large businesses and for scientific purposes. You probably won't find a mainframe in any household. In the hierarchy of computers, mainframes are right below supercomputers, the most powerful computers in the world. (Techterms.com, 2018).

*Front & Back-end design* in software engineering, the terms front end and back end refer to the separation of concerns between the presentation layer (front end), and the data access layer (back end) of a piece of software, or the physical infrastructure or hardware. In the client–server model, the client is usually considered the front end and the server is usually considered the back end, even when some presentation work is done on the server.

*Software-as-a-Service (SaaS)* is a software licensing model in which access to the software is provided on a subscription basis, with the software being located on external servers rather than on servers located in-house. Software-as-a-Service is typically accessed through a web browser, with users logging into the system using a username and pass-
word. Instead of each user having to install the software on his computer, the user can access the program via the internet. Businesses commonly use SaaS in customer retention management, human resources and procurement. (Radcliffe, 2018)

*Sales force automation*-Abbreviated SFA, sales force automation is a technique of using software to automate the business tasks of sales, including order processing, contact management, information sharing, inventory monitoring and control, order tracking, customer management, sales forecast analysis and employee performance evaluation.

1.2 Thesis Objective and Structure

As a CRM distributor for mainly enterprises, Softline is looking to explore the CRM-related challenges Russian enterprises are facing in order to develop a better customer service that would help reduce CRM implementation risks. The main objective of this thesis is to define the main challenges of CRM system implementation for Russian market, analyze them, compare with the general implementation challenges and provide suggestions for Softline. The project team has created a structure that will help accomplish the main objective:

-Theory: The theoretical framework of this thesis will cover the concept and features of CRM and Business intelligence, theoretical research about the market leaders and CRM system implementation on western markets, as well as a historical view of CRM and finally the implementation processes and steps.

-Research: Interviews with Russian employees who had previous experiences with CRM project will be held, analysed and presented to verify our theory and possibly lead the team to new findings concerning the Russian market. The research methods, validation of sources and analysis will be further explained in this chapter.

-Suggestions: In the last chapter, the research will be translated into future solutions and suggestions to which factors of focus could minimize CRM implementation risks will be given.

1.3 Commissioner introduction

Softline Group was founded in 1993 in Moscow as a supplier of scientific software. The domain name is considered one of the oldest (11th) in the “.ru” domain. By 1998 Softline’s main business was the distribution of software from Microsoft and other vendors. In 1999, Softline launched its first training centre followed by opening its first branch office in Minsk in 2001. From 2002 up to 2008 Softline expanded inside Russia
and CIS region. They also introduced new services such as IT outsourcing, auditing, Microsoft Dynamics, SAP products and IT infrastructure build ‘n’ run services.

In 2008 Softline started to expand outside Russia & CIS and opened its branches in Turkey, Venezuela and Vietnam. In next the years the company has entered IT markets in more than 30 countries. Since 2014, Softline is ranked within the top 5 Russian IT companies, according to Russia’s international news agency RIA Novosti. In 2015, Softline became Microsoft’s global partner with highest partnership statuses in many business segments & services. During the same year, Softline successfully launched a 600+ rack data centre in Belarus, the largest in Eastern Europe. Since 2015, Softline is 3rd largest supplier of BI and SaaS (Software-as-a service) on Russian market. (Anon, 2018). Softline has partnerships with more than 3,000 software and hardware vendors including Microsoft, Oracle, VMware, Adobe, HPE, IBM, EMC, Symantec, Dell, Citrix, Autodesk, Cisco Systems, Salesforce.com, Kaspersky Lab, Huawei amongst others. (Wikipedia, 2018)

1.4 Russian market context

The Russian CRM market experienced an exponential growth in the past 10 years. As the CRM industry in Russia was born in the late 90’s, IT experts were claiming that the CRM market will quickly expand in the beginning of the 2000s, which didn’t happen. The usage of CRM systems in Russia was limited: only customer-centric industries like the banking sector and telecommunications. In 2002 the first Russian-made CRM systems were introduced: 1C Company, the leading software provider in Russia that developed accounting and ERP integrations before, added a CRM module to the package. Terrasoft, the second leading software provider in Russia, besides developing their own CRM system they also provide consulting services concerning the CRM strategy. (TAdviser.ru, 2018).

Between 2004 and 2010 western IT enterprises started to distribute their CRM products in Russia: Siebel, SAP, IBM entered Russian market during that time. By 2016, the CRM market value reached 10,4 billion rubles compare to less than 6 billion in 2005, displaying significant growth in implemented projects and enterprises interest in CRM systems. (TAdviser.ru, 2018). TAdviser, the technology & business magazine for enterprises, states that the main issue of CRM usage on Russian market is that by 2015, Russian companies still do not use the full functionality of CRM systems – companies are utilizing only half of CRM functionalities for certain business processes. (TAdviser.ru, 2018). The reason behind this will be explored in this thesis, and the state of the Russian CRM market will be revealed below.
2 Customer relationship management as a concept

In this chapter below the authors will reveal concepts preceding to CRM, provide the definition of CRM as a business model and as a specific IT instrument, and explain why CRM software is beneficial for the enterprises.

2.1 Transactional marketing

Transactional marketing is the traditional business approach that is solely focused on making sales. It is a strategy where sales volume is the main goal. It is based on the “four Ps” of the marketing mix (Product; Price; Place; Promotion) which is a tactic to help attract customers and convince them to make a purchase. According to Ginger S. Myers, Regional Marketing Specialist for the Western Maryland Research and Education Centre (S.Myers, 2018), “the transactional marketing approach seeks to make the largest number of sales possible”. Expressly, transactional marketing is a strategy that concerns “point of sale” transactions instead of improving the relationship with customers.

2.2 Relationship marketing

During the early years of the industrial revolution and the emergence of capitalism the focus in marketing started to shift towards building and maintaining relationships with buyers. With the evolution of business and marketing, globalization and information technology, marketers started to understand customers as a key business asset as customers are much more informed. It is a strategy that focuses on customer retention as much as customer acquisition, emphasizing value creation instead of value distribution. According to Juneja (2018) Relationship marketing is not only about customers, but about relationships between all stakeholders involving all markets:

- Internal market: Company’s vision and beliefs, values and culture. Including a company’s processes, people and groups.
- Referral market: Includes happy customers, partners who could get new customers through referrals, advisors, word of mouth.
- Supplier market: Vendors and suppliers that a company needs to create a final product.
- Business Market: Marketplace for buying raw materials or natural resources for resale or manufacturing. Forms the external business environment.
• Customer market: End users as well as intermediaries.

There are lots of exchanges happening between those markets, and Relationship marketing aims to improve those relational exchanges and create a harmony that will bring customer loyalty and secure future sales for the business. (Juneja, 2018) As we can see, relationship marketing is a method that has a very large scope and will require advanced organization and advanced information management. To help with information management, businesses use Business intelligence tools and CRM software. Business Intelligence tools (which we are covering below) are tools that will help manage information related to Internal, referral, supplier and business markets, while CRM software help with the customer market information management. (Juneja, 2018)

2.3 Definition of CRM

According to Dr Adrian Payne, CRM is a cross-functional strategic approach concerned with creating Improved shareholder value through the development of appropriate relationships with key customers and customer segments. (Payne, 2009). It typically involves identifying appropriate business and customer strategies, the acquisition and diffusion of customer knowledge, deciding appropriate segment granularity, managing the co-creation of customer value, developing integrated channel strategies and the intelligent use of data and technology solutions to create superior customer experiences.

Usually, the term CRM is used very differently across different industries and within specific vertical Markets. As part of research, Adrian Payne, a Marketing professor in the University of New South Wales, examined many definitions of CRM and explored how organizations viewed CRM. (Payne, 2009). He identified that CRM is typically defined from one of three perspectives: narrowly and tactically as a technology solution, wide-ranging technology and customer centric. One interviewed organization described CRM solely in terms of its sales force automation project. At this extreme, CRM is defined narrowly and tactically as a technology solution. (Payne, 2009)
2.4 Benefits of implementing a CRM software

Implementing a CRM software could have multiple benefits for a company. All administrative and management tasks associated with customer management, cold calling, pre-sales and after sales are taken care of by a CRM software which will reduce the amount of manual labour and processes needed. (Hillsberg, 2018)

Furthermore, since the sale of products to customers will be held in an organized way, it helps businesses provide better services and more accurate products to customers due to a better understanding of their needs and problems. This could help increase customer loyalty. With a CRM software, every interaction between salesmen and customers about wants, needs etc. is stored in a database accessible to all employees, which improves a company’s ability to up-sell and cross-sell. (Hillsberg, 2018).

In addition, having a CRM software improves internal communication within a company. Since all customer data is stored and shared between different departments, a company can offer better services to customers and minimize mistakes that could cost the loss of customers. (Hillsberg, 2018).

Having a CRM software helps businesses attain those advantages by collecting customer-related data leading to solid insights and decisions. (Bain, 2018) Nowadays, the competition revolves around the effective use of data, organizations with the competitive edge are the ones that invest in and extract value from their data. (Ey.com, 2018). In order to practically understand how customer-related and operational data is processed for effectiveness increase, the concept of Business Intelligence will be explained in the chapter below.
3 Business intelligence

As the concepts of business intelligence and CRM are closely related to each other and CRM systems are a core component of business intelligence, the author decided to review the concept of business intelligence and its benefits for businesses. Covering the concept of business intelligence will help clarify the nature of CRM and how it works.

3.1 Definitions and uses

The term Business intelligence represents the set of techniques, technologies and methods used to collect and analyse and present business information. The purpose of Business intelligence is to provide a better vision for the business and therefore support better business decision making. (Gartner IT Glossary, 2018)

BI supports multiple business solutions, from operational (positioning of a product, price) to strategic (general directions, priorities, targets) by providing historical, current and predictive views of business operations.

3.2 Benefits

Enterprises implement business intelligence and analytics tools for various reasons to gain benefit. However, vaguely, the common main reason behind using business intelligence software’s is to turn raw data into comprehensive insights and directions. Therefore, BI is expected to provide an understanding of what shapes the market and other businesses and help companies act accordingly.

To verify this, the Business Applications Research centre (BARC) asked over 2500 BI users in a survey by giving them a list of potential benefits of business intelligence (e.g. better business decisions, improved employee satisfaction...) and asking them at what level have they achieved those benefits. (Janoschek, 2018)

The survey results showed that the most significant benefits of BI are:

1) Faster reporting, analysis or planning.
2) More accurate reporting, analysis or planning.
3) Better business decision.
4) Improved data quality.
The least significant benefits of BI are:
1) Saving headcount.
2) Increased revenue.
3) Reduced costs.
However, in the future, BI will help with increasing revenue as nowadays, businesses see the value of data which helps data monetization grow. (Janoschek, 2018)

3.3 How Business Intelligence works

A data warehouse or enterprise data warehouse (EDW) is considered as core component of Business Intelligence as it stores, processes and filters the data extracted from operational systems (CRM, ERP) and documents. (Patil, 2018)
The figure below shows every stage of the data’s journey processed with Business Intelligence.

![Data warehouse architecture](image)

Figure 1: Data warehouse architecture (Kamenskii, 2018)

**Stage 1, Data sources:** data being collected from different operational sources (CRM, ERP) and documents.

**Stage 2, Staging area:** intermediate storage area used for data standardization, consolidation of data from different sources and invalid data removal. This process called ETL (Extract, transform and load) (Patil, 2018).
**Stage 3, Data warehouse:** Data storage that stores Metadata (information about the structures that contain the actual data), raw data (unprocessed data) and summary data. (Patil, 2018)

**Stage 4, Data Marts:** Data marts from "warehouse" being grouped specifically for a separate business line or department. For example, all financial indicators and info will be merged into financial data mart and provided, at first, to financial department (Docs.oracle.com, 2018).

**Stage 5, User usage:** different departments and users can access, review, analyses, exchange and report on processed and user-friendly data.
4 CRM features

In this chapter the authors will go through the different types of CRM systems and their functions as well as the state of the CRM market in Russia and worldwide. This supports the identification of stakeholders in a CRM system.

4.1 Types

Analyst firms such as Gartner classify CRM into several types (Peelen, 2009):

- Operational CRM. This is the area concerning the automation of business processes involving front-office customer contact points. These usually includes customer service automation, marketing automation, and, of course sales automation. Operational CRM has been the largest area of enterprise expenditure because almost all enterprises develop sales force automation or call centres in certain way. CRM vendors focus on offering a wide range of enterprise scale operational CRM solutions. (Peelen, 2009)

- Analytical CRM. This type of CRM includes the capture, organization, analysis, interpretation and storage of data created from the operational side of business. Integration of operational CRM with analytical CRM is an important consideration usually done by CRM vendors nowadays.

- Collaborative CRM. This involves the use of infrastructure, cooperative tools and collaborative services for internal interactions and multiple channels possible. This enables interaction between customers, the enterprise and its employees. (Peelen, 2009)

4.2 Functions

CRM for an enterprise is the combination of Operational, Analytical and Collaborative into one software. In this subsection main common CRM functions regardless of the software. In the table below divides all functions into three main categories Operational functions, Analytical functions and Collaborative functions. (Peelen, 2009)
| Operational functions | Sales Automation: automation of certain sales aspects such as outgoing calls, follow-up campaigns and organization of data for improving campaign effectiveness.  
Business Management: easily accessible database with information about organizations, customers, partners, dates with large organization and management capabilities like segmentation of contacts by groups for easier information analysis and visuals creation.  
Workflow and approvals: CRM system can facilitate workflow by automating processes like data analysis and collection, data organization and segmentation and other tasks that were previously done manually.  
ERP Integration: Enterprise resource planning module can be added for payroll, accounting and HR management. |
|---|---|
| Analytical functions | Sales Analytics: CRM allows you to collect data from social campaigns, website traffic and polls and analyse all collected data in CRM system straight away.  
Lead Management for determining high-quality leads: technology that allows you to find best leads using demographic and psychographic data.  
Reports and dashboards: highly visualized data and statistics, with capacity to create custom reports and customize dashboard.  
Automated Web Analytics and SEO Integration: CRM automatically collects raw data on who, what and when interacted |
with website, recognizes the problem areas and suggests how to Optimize website for Search Engine.

**Collaborative functions**

**Role-based views:** Ability to manage level restrictions and visibility for different employees for keeping the customer data secure.

**Collaboration software integration:** Various types of messengers, electronic document management and other collaboration modules.

**Support Automation:** Email correspondence, FAQs and chatbots technology becoming a valuable and useful module as AI computing and automated data management develops.

<table>
<thead>
<tr>
<th>Table 1: CRM functionality list, (Peelen, 2009)</th>
</tr>
</thead>
</table>

### 4.3 Worldwide leaders in the CRM market

According to Gartner, a global research and advisory firm, the customer relationship management software revenue became the leading software market in the world with $39.5 billion in 2017 and was forecasted to be the fastest growing software market in 2018 with a growth rate of 16%.

Every year, Gartner releases CRM market shares amongst top vendors in order to show which leaders are empowering this CRM market growth. CRM suppliers are divided into two categories: Sales Force Automations and Customer Engagement.

Gartner uses Magic Quadrant reports to help visualize where CRM vendors stand in comparison in both Sales Force Automations and Customer Engagement.

**Sales Force Automation Leaders:**

**SalesForce** is the first leader in that category due to having multiple features to help automate business processes, including email marketing and marketing automation. Furthermore, SalesForce has developed an AI-powered analytics software “Einstein”, which helps these automations become faster, easier and more powerful.
Microsoft is the second leader since it offers users detailed customization options, which help personalize every user’s experience depending on the type of requirements by organizations but also by individuals.

Oracle is the third leader as it features core SFA abilities for Business processes. Possesses improved mobile features and improved analytics capabilities.

Customer Engagement Leaders:
SalesForce is the leader in that field as well since they offer multiple cloud solutions. Being a strong leader in the industry and a fast-growing firm, SalesForce is not only considered as a CRM provider, but also an advisor.

Pegasystems is the second leader because they offer their services to a very large scope of Business sizes and industries. They feature cloud-based, on-premise, mobile and web services to be able to fit the needs of every customer.

Microsoft is the third leader. Besides the fact that it is a well-known company that many customers trust already, Microsoft customer service software which is used as an independent module within the CRM software is behind its success.

4.4 Russian CRM market leaders and trends

CRM market fragmentation is different in Russia compared to the Western market. There are no statistics available about a clear market leader in Russia because every industry and business size have their own preferences and requirements when it comes to choosing a CRM system. On the other hand, the authors managed to find information about Suppliers with the most CRM implementations: two leading system integrators in Russia are “Terrasoft” and “1C”: 509 and 275 projects respectively, both are doing system integration of their own system. (TAdviser.ru, 2018)

It is crucial to mention unique position of “1C” CRM on Russian market. 1C Company is one of largest software vendors & project implementors in Russia. (TAdviser.ru, 2018). Since the establishment in 1991, they are leading in enterprise-scale implemented projects including CRM projects. As 1C developed the only certified and “allowed-to-use” in Russia automated accounting integration, enterprises started to implement it since early 1990s. By 2000, 1C introduced several new software solutions for business like inventory management, EPR integration, HR and merged everything into unified “1C: Enterprise” configuration. In 2002, when “1C: Enterprise” was the most used IT automation platform for enterprises because of being only legally allowed automated accounting application, 1C
supplements “1C: Enterprise” configuration with CRM integration, making 1C: Company market leader in implemented CRM projects instantly. (TAdviser.ru, 2018)

Another feature of the Russian market is the government policy to gradually replace foreign vendors software & hardware with domestic products on government and enterprise levels for accelerating economy growth, technological development and, of course, security reasons. Two figures below display growth in purchasing of domestic software and IT services in Russian regions from 2014 up to 2016. (Rostec.ru, 2018)

Figure 1: Growth in purchasing of domestic software, (Russian Ministry of Communication, 2016)

Figure 2: Growth in purchasing of domestic IT services in Russian regions (Russian Ministry of Communication, 2016).

In the table below the author provides evidence of import substitution process by providing information about the biggest IT substitution projects in Russia.
<table>
<thead>
<tr>
<th>Customer</th>
<th>Executor</th>
<th>Which foreign product being replaced</th>
<th>Which domestic product being implemented</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal tax service</td>
<td>“IBS”</td>
<td>VMware platform virtualization</td>
<td>“Rosplatforma” virtualization</td>
<td>2015</td>
</tr>
<tr>
<td>“Transneft”</td>
<td>“Galaktika”</td>
<td>SAP software</td>
<td>“Galaktika ERP”</td>
<td>2017</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Galaktika CRM”</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>“Galaktika accounting”</td>
<td></td>
</tr>
<tr>
<td>National guard of Russia</td>
<td>“Filosofiya.IT”</td>
<td>Oracle database management system, Oracle WebLogic</td>
<td>PostgreSQL database management system</td>
<td>2017</td>
</tr>
<tr>
<td>“Faberlik”</td>
<td>“IT integrations”</td>
<td>Warehouse automation system based on MS Dynamics AX</td>
<td>“1C” warehouse management</td>
<td>2017</td>
</tr>
</tbody>
</table>

**Table 2:** Import substitution in Russia (TAdviser.ru, 2018).

This table reflects on the import substitution process that is ongoing now in Russia. It displays that substitution process affects both software (including CRM) & hardware projects in government and non-government entities. (TAdviser.ru, 2018).
5 Strategy and CRM system implementation

Before moving on to the empirical research of the thesis, the authors will conduct a theoretical research about the process of CRM implementation & identify the main challenges of implementation and create a framework that is going to be tested in the empirical research.

5.1 The importance of having an IT strategy prior to a CRM project

As usually CRM projects are being executed in form of multistage and multicomponent project, that requires cooperation from different departments and involves different business aspects (sales, marketing, technical department, governance). It is crucial to have a staged IT strategy to correlate between business goals and IT tools and instruments that could help to optimize business processes.

According to Rick McCutcheon, leading strategist, speaker and writer on CRM and Sales development, any CRM implementation process can be done in 16 steps (McCutcheon, 2018):

![CRM implementation steps](Kamenskii, 2018)

**Figure 3:** CRM implementation steps (Kamenskii, 2018)
For easier analysis of the implementation strategy depicted above, all steps were divided into three stages:

- Planning
- Implementation
- Training and support

5.2 Strategic analysis, KPIs and building a team

Most of CRM projects, if not outsourced starts from setting objectives for the project, defining KPIs and performing strategic analysis (for ex. SWOT) and establishing measuring criteria for evaluating project success. Russ Lombardo, author of “CRM for a Common man” book, suggests some of them (Lombardo, 2003):

- Revenue
- Cost per Sale
- Average profit margin
- Market share
- Units sold
- Increased qualified leads
- Decreased number of customer complaints
- Number of calls/visits per day
- Shortened transactional times
- Increase in Customer satisfaction levels
- Increased revenue, profits, ROI, etc.

Building a team with the right representatives from different business aspects is also crucial for CRM project success. (Lombardo, 2003).

According to the (Lombardo, 2003) CRM project team should consist of:

1. Sales management
2. Marketing management
3. Senior management
4. IT
5. End users
6. Customers
7. Technical support

After building a team and submitting objectives and KPIs, according to Rick McCutcheon, the enterprise governance needs to allocate an approximate budget for CRM project,
which can be adjusted after choosing and designing the CRM system. (McCutcheon, 2018)

5.3 Process mapping

Process mapping is one of the most important steps in any IT project planning stage (Madison, 2008): every business process that will be involved in CRM system needs to be visualized and described in detail. This part is crucial for CRM process as systems engineers will use process documentation to customize the CRM for business needs.

![Process Map Diagram](image)

**Figure 4:** Example of sales process map (Lucidchart, 2018)

In addition, according to the Rick McCutcheon (McCutcheon, 2018), process mapping is also beneficial for understanding technology requirements (which software to choose, how to customize it for certain business process) and it gives the ability to better manage the roles and responsibilities of each team member. Process map is usually being present in the form of vertical diagram. The main purpose of the process map is to provide detailed
information about process execution. By creating a process map the organization has the opportunity to manage, contribute, and evaluate the effectiveness of the process. (KPMS, 2018)

5.4 Creating a requirements list and choosing a CRM software

After defining and mapping all key processes of business, the next step will be setting and prioritizing requirements for CRM software and choosing the right software.

As creating a requirements list is also one of the key stages of CRM implementation process, the vision and requirements from different business aspects should be considered. (Lombardo, 2003)

According to Rick McCutchen, every department which will be involved in CRM process, enterprise governance, IT department and 3rd party users should build their own specific list of requirements for CRM software.

![Diagram of Parts to Consider in Requirements List](image)

**Figure 5:** Parts that should be considered in requirements list (Kamenskii, 2018)

After the system requirements is set, the CRM project team and governance needs to choose and design the CRM system.

According to Russ Lombardo, software selection can be done in 5 steps (Lombardo, 2003):

- Developing an RFI (Request for Information)
- Vendors present their solution based on day-in-life scenarios
- Picking 3 finalists
- Ensuring IT performs technical evaluation
- Making final selection based on current and future needs

When the software selection is done, it is time to start implementing the system. However, implementing a CRM system does not always go smoothly. The implementation process
can be challenging for many companies as CRM is still a growing subject with many aspects to focus on during its implementation and the use of it.

5.5 Implementation challenges

Forrester Research conducted online surveys to find out what kind of challenges businesses and employees are facing during the use and implementation of a CRM system. In order to tackle every side of potential problems Forrester asked 3 questions dividing the survey into three parts. The first part concerns people problems, the second one concerns the lack of well-defined requirements, the third part concerns process design problems. (Campanella, 2018)

The survey results are as follows:

"Thinking about the problems that you encountered during the implementation of your CRM initiative, please indicate your level of agreement with the following statements."

(Percentage of respondents who selected "Agree" or "Strongly agree")

- Lack of rewards for customer-centric behavior: 47%
- User adoption struggles: 46%
- Employee responsibilities did not match business and technology needs: 45%
- New business processes and CRM solution required too much change in culture: 41%
- Lack of full support across all levels of management: 41%
- Inadequate capture of employees' feedback for process changes: 40%
- Insufficient CRM user documentation: 37%
- Lack of support from senior executives throughout the planning and execution timeframe: 36%
- Inadequate training: 36%
- Inadequate CRM subject matter experts: 35%
- Inadequate screening of candidate skill sets during hiring: 33%
- Inadequate screening of candidate customer-centric values during hiring: 30%

Figure 6: People problems (Forrester, 2015)
Figure 7: Lack of well-defined requirements (Forrester, 2015)

![Survey results on lack of well-defined requirements](image)

Figure 8: Process design problems (Forrester, 2015)

These survey results show that concerning people problems the 3 main issues are:

- Lack of rewards for customer-centric behaviour
- User adoption struggles
- Employee responsibilities did not match business and technology needs

Concerning the Lack of well-defined requirements:

- Core CRM requirements
- Integration requirements
- User experience requirements

Concerning Process design problems:

- Struggles with process documentation
- Mobile CRM capabilities do not support frontline business processes
- CRM does not support current business processes

In this survey we can see that the lowest percentage is still a significant number of businesses who encountered the problem. This shows that there are many dimensions when it comes to people problems. Lack of rewards for customer-centric behavior as the number one problem shows that CRM providers still fail to offer features that would reward end-users.

The second survey results indicate that either CRM end-users are still unable to use the basic features or are not offered enough features by the Supplier. The fact that many CRM providers offer all kinds of features tells that CRM providers are not showcasing their features as much as they need to. The Last survey indicates that features included in CRM software are not user-friendly enough. (Campanella, 2018)
The surveys conducted by Forrester research illustrate a broad image of what kind of challenges businesses face when implementing and using a CRM system. In the next chapter, another research method will be used to tackle the same problem with Russian employees. Results will then be compared to the current ones which will help confirm their legitimacy for the Russian market and possibly discover new aspects to the potential risks.
6 Empirical research introduction

This chapter discusses the research methods used and the reason behind their choice. Moreover, the choice of interviewees and type of interviews will be explained.

6.1 Research Method

A qualitative research seeks meaningful answers, it describes individual perceptions of a certain subject. It tends to have a more complex and inductive analysis of results. Qualitative research methods are often used for explorative research questions (e.g. how? Or why?). A quantitative research seeks causes and explanations, answers and results are more direct and conclusive. The analysis of results is precise and statistical, answering more precise research questions (e.g. What? When? Where?) and analyzing them with a deductive approach. (McGill, 2018)

As mentioned in the Introduction, our research question is what are the main reasons behind the failure of Russian enterprises in implementing Customer Relationship Management System and how can they be successful in the future? The answer to this question requires a qualitative as well as a quantitative approach because the question is precise and explorative.

In the last chapter of the theoretical framework, the results of a quantitative research done by Forrester tackling the same research question on a global scale was presented. Therefore, the authors have decided to conduct a qualitative research in the form of interviews to put all results into perspective and get a clearer more accurate idea of the problem.

The interview questions focused generally on every angle of the interviewee’s personal experience with CRM system. There was no order to the questions as all interviews were semi-structured interviews. Each interview was an open discussion and lasted 40 minutes on average. The authors prepared 3 different sets of questions for different employee positions in a company. This will be explained further in the data collection chapter.
6.2 Data Collection

Exploring the definitions of CRM in the theoretical framework helped the authors identify four general perspectives to CRM usage and implementation (training, technical, business and end-user perspective). Accordingly, three different sets of interview questions were prepared (appendices) to fulfill those perspectives. Interviews were conducted with 3 different employees of Softline with the highest experience with CRM that could talk on behalf of other employees.

Figure 10: Interview matrix

The timeframe for the Thesis was limited to only 2 months, hence why we could only get 3 interviews with Softline employees. The interviews were all done on skype and in Russian language. As the questions were prepared in English, the authors had to translate the questions to Russian. All interviews were recorded in Russian, transcripts were then translated and analyzed in English. The whole process of Interviewing, translating and analyzing results took 3 weeks.
7 Data analysis

The authors decided to use the fifth chapter of the theoretical framework as a basis for the empirical research analysis. In other words, the fifth chapter of the theoretical framework covers the general CRM implementation process regardless of the market or industry. In the empirical research the authors gather insights about CRM implementation in the Russian market, compare it with general CRM implementation process provided in chapter 5 (actual analysis) and give implementation improvement suggestions for Softline. In this Data analysis chapter, the authors analysed the data collected by putting it into perspective with chapter 5.

7.1 Challenges from a technical perspective

Structured database challenge

According to Alexandr Gotsiridze, CRM product developer & manager, the main implementation challenge from IT point of view is developing a structured database for specific business requirements of customer. The main factors that should be considered are business sector of customer and his sales process. For example, one of the customer’s business processes relates to suppliers of industrial equipment. In this case the implementor needs to install a whole module that consists of nomenclature of equipment, storing requirements, delivery terms, terms of warranty and support through the business process. That is why it is extremely important to specify all the business processes before building the system, because missing information about how the business works and what information should be considered in the system later, can lead to the malfunction of CRM system after implementation, and to fix this, the enterprise will need to issue a support case for the supplier. In addition, it is very important to correctly input/export the information into CRM system.

Hybrid infrastructure challenge

As part of the quantitative research in the theoretical framework the authors provided statistics stating that lack of integrating CRM with other office applications and software’s is one of the major implementation issues. Sergey Slukin, Microsoft certified Dynamics CRM implementor & trainer, confirmed that a CRM project nowadays is a multicomponent infrastructure that includes software & hardware from different vendors and syncing all IT infrastructure sometimes is a problem. As a solution Sergey suggested creating a compliable
ecosystem with all software and add-ons from one vendor or hiring an IT consultant that knows which software easily work with each other.

Sergey stated that on the Russian market, enterprises chooses CRM system to implement according to sector they operate in. But most of the Russian large-scale enterprises are using 1C: Enterprise, a Russian-made IT ecosystem that consists of its own ERP, CRM, HR and finance management software.

The author provided main worldwide & Russian CRM leaders that are developing compatible software ecosystems in forth chapter of theoretical framework.

![Diagram](image)

**Figure 11**: Example of “Compatible ecosystem” that consists of one vendor’s modules (Kamenskii, 2018)

In addition, Sergey mentioned that first tier CRM systems like MS Dynamics and Salesforce possess web-store from where you can download compatibility-tested modules and add-ons for CRM software.

**Data flow challenge**

Alexandr Gotsiridze stated, that from a technical perspective the most crucial part is designing data flow chart. In data flow chart software engineer needs to specify & analyze sources of data and its flow throughout the system, review and specify destination and extraction points for different type of data. Basically, data flow map engineers specify which types of data, its usage in business processes.

### 7.2 Challenges from a business perspective

**Process documentation challenge**
According to the statistic that the authors provided in theoretical research of thesis (Figure 8, chapter 5), process documentation is the main challenge when it comes to business perspective of CRM implementation. Both Sergey Slukin and Alexandr Gotsiridze confirmed during the interview that without a properly prepared process documentation in form of process map, the project will most probably fail both in terms of IT and business. As a reason Alexandr stated that in most of cases enterprises ignore spending their resources and time on developing proper process documentation or lack of internal specialists that can provide proper process documentation. As a solution Alexandr suggested to use consultant agency help for process re-engineering and IT usage adoption.

The author provides example of business process mapping in fifth chapter of theoretical framework.

**Project planning**

One of the biggest outcomes of the interview conducted with Igor Kamenskiy, head of hardware sales department in Softline and project implementor, is the realization of how important it is to use guidelines for a CRM project. Igor in the interview states that most of the late stage issues appear because of the lack of project planning and guidance in the beginning. He stated a few main reasons behind poor planning:

- Lack of governance control and interaction with CRM project
- Not developing project guidelines
- Poor quality project plan
- Ignoring experience of implementation of other enterprises

Many enterprises ignore the fact that failure is a true possibility and that there are plenty of tools already existing to assist with IT project planning and avoid failure risks. For example, the governance of many Russian enterprises ignores the fact of existence of COBIT and ITIL frameworks that were created for structured and consistent implementation of IT projects and their guidance, including CRM. Instead of using a verified framework for project plan, the governance develops its own project plan that usually isn’t considering all aspects of the project and not introducing standards & guidelines to be followed throughout the project. Igor suggests using KPIs, verified framework for project planning and keeping the governance interested in the project: if decision makers could stay updated about the project it could accelerate project speed. This confirms the authors theoretical findings about CRM project planning presented in subchapters 5.2 and 5.4.
7.3 Challenges from a training perspective

Sequence & levels in training process.

During conducting theoretical research, the author analyzed Rick McCutcheon’s strategy of implementing a CRM system (subchapter 5.1) and distinguished sequence in CRM training process: technical specialists and system administrators should receive training before end users (detailed overview in figure 3, subchapter 5.1).

To start with, Sergey Slukin confirmed the authors findings concerning training sequence and gave the authors additional insights about subjects of training and specifics of Russian market.

Sergey also confirmed that the biggest implementation challenge on Russian market is training, as the training process for CRM project is quite a complicated process. To begin with, there are different types of trainings that needs to be provided to different levels of users. To present results in the structured way the authors decided to create a table that will reflect on types & levels of user training.

<table>
<thead>
<tr>
<th>Trainee</th>
<th>At which stage of the CRM project training is taking place</th>
<th>Description of training process</th>
</tr>
</thead>
</table>
| Technical specialists & System Administrators | Training being conducted before start of the project | • Adjusting reports  
• Data structure  
• Designing user interface  
• System maintenance  
• Rights assigning  
• Front-end design |
| System Programmers              | Training conducted in the very beginning of the project                        | • Data flow design  
• Code-related issues fixing  
• Back-end design |
| Salespeople and other end-users | After technical stage of the project is finished and system is designed | • System usage  
• In-system collaboration  
• Data import & export  
• Complete sales process & sales funnel in CRM  
• Reports creation |
| Service & Call-center | Last stage of the project | • Introduction to unified ServiceDesk modules for CRM  
• Explaining user interface  
• Scripted scenarios  
• Result input |

Table 3: Sequence of training process (Slukin, 2018)

**Training materials availability**

Sergey Slukin stated that the biggest obstacle in training process is availability of training materials and courses for technical specialists, system administrators and salespeople. As an example, Sergey cited: “Microsoft possesses a huge training ecosystem: it develops training materials under their own trademark, issues online courses on electronic training platforms like Moodle, but there these materials are not available in Russian, meaning that Microsoft doesn’t issue materials on Russian language that are using the same terms, metrics and definitions that are common on Russian market”. Sergey also specified that this issue is common among all foreign vendors on Russian market.

Sergey also specified that because of this situation many enterprises are forced to take a more complex approach to the training process: if the CRM project manager or CRM admin possesses enough skills and knowledge for providing training to different user groups, than usually the governance assign him to conduct the training. Otherwise, the enterprise hires a subcontractor that develops training materials or courses on electronic training platform or another specific format that will help to evaluate employee’s knowledge of
CRM software.

**Providing the value of system usage and explaining the full system functionality**

The second biggest training challenge is providing the value of CRM system usage for employees. Sergey Slukin confirmed that many CRM end-users aren’t aware of CRM benefits for business and because of that end users doesn’t utilize the full range of tools that CRM provides. In many enterprises issue comes from IT-centric training process, that covers only “how-to-use” questions, but not “why-to-use”.

According to Sergey, the biggest drawbacks of end user’s unawareness about CRM benefits are:

- End-users do not document input all information about sales and deals into the system and use paper notes instead.
- End-users are unaware of the CRM tools and integrations (BI applications, visualization tools, reports creation) and utilize CRM system for certain business processes only
- Even though a CRM software provides a lot of collaborative capabilities for users, end-users still prefer to collaborate on business matters outside of CRM system.

### 7.4 After implementation challenges

As an outcome after interviews that the authors conducted with different CRM project influencers and users, the authors realized that CRM system sustainability in the future relies on how end-user will utilize the system straight after system being implemented.

**Incorrect data input and data duplication**

The biggest challenge for end users and salespeople is to keep one format for data from the beginning of CRM usage. Quite often a case that appears straight after CRM system is implemented is that salespeople starts to input info about their leads, companies and contacts into CRM system without keeping same format for info, for example, if one salesperson inputs company name as let’s say “KONE Oyj” and different salesperson puts it as “Oyj KONE” or “KONE Oy”, system will recognize two different companies which will create so-called duplication issue in the database.
8 Conclusion

In this chapter, suggestions based on the theoretical framework and the research will be discussed and listed down before the conclusion about the thesis process.

8.1 Suggestions

After analysing the interviews conducted, different challenges from different perspectives have been identified and gathered. In this section, Solutions for each perspective are going to be provided.

To start with, some of the challenges that are still existing on the western markets such as lack of process documentation and poor project planning, are a bigger problem in Russia. The reason is because enterprises are unaware about the existing methodologies for quality management control and IT projects implementation such as ITSM, COBIT and ISO9000.

As an outcome of data analysis and comparing the empirical research against the theoretical framework, the author concluded that most of CRM related issues on Russian market are like western markets, except challenges that are affected by the industry trends, government information policies and language.

The Industry trend that heavily affects CRM implementation in Russia nowadays is Import substitution. As a consequence, many enterprises are forced to change their CRM system as part of the whole IT-infrastructure and this makes the system compilability challenge even more important and difficult. As a solution for that the authors suggests choosing ready-to-go Russian made solutions which already includes all types of needed infrastructure& software linked to each other. For the enterprises with the specific business model, the authors suggest hiring IT-consultancy with the experience in implementing custom projects and knowledge of the industry.

Russian government information policy is another major trend that affects the CRM industry and Russian IT sector generally. The main issue here is strict policy when comes to building IT infrastructure in enterprises. There is limited amount of the hardware & software products allowed to use at the enterprise level (particularly in government-controlled enterprises), and most of the products are Russian made. Despite the absence of strong restrictions when it comes to choosing the CRM software itself, linking it with the rest of IT infrastructure could be a problem. Once again, here the authors suggest using ready-to-go solution that is already being tested by other businesses to avoid malfunction.
Language is also one of the major problems in the CRM industry and in the Russian IT sector. As many foreign vendors are ignoring the importance of creating the proper Russian language localization and limit themselves with creating a general localization without talking into account translation of training materials for different user levels, as well as translation for additional modules, applications and business processes. In addition, foreign vendors are also usually not considering that there are different acronyms and terms that are used in Russia and needed to be included in the localization. As a consequence, the Russian enterprises are forced to install domestic-made CRM system or to hire IT consultancy that can take care of localization issues.

Below, the authors will list other suggestions for enterprises or project implementers:

**Technical perspective:**

- Provide a structured export of data from previous databases to CRM.
- When choosing a CRM system, enterprises need to seek a supplier with one compliant ecosystem including all software and modules or hire an IT consultant that can link all different software and modules together: Russian made ecosystem is preferable.
- In the case of cloud-based CRM, enterprises need to have a fast internet connection.

**Business perspective:**

- Use a verified IT framework for process documentation and project planning.
- Keep decision-makers up-to-date with the CRM project.
- Introduce standards, guidelines and KPIs to be followed throughout the project.
- Apply quality management systems for quality control.

**Training perspective:**

- Plan and organize training sequences from system administrators to end-users.
- When choosing a CRM system, pay attention to the availability of training materials in the market and in the desired language or hire an IT consultancy that could prepare training materials for the enterprise.
- While training end-users, the training should not only cover how to use the CRM system, but also provide the value behind CRM system usage.
• Include CRM usage in the end-users KPIs to possibly reward active CRM users and therefore encourage employees to use the CRM.

• Explain the value behind every module and tool in CRM.

• Introduce and Unify format for CRM data input.

8.2 Conclusion

The objective of this thesis was to cover all factors that could potentially create failures in a CRM system implementation and to verify the significance of these factors in Russia. The initial plan was to interview employees in Finnish enterprises to be able to have a better comparison of Western and Russian enterprises. However, due to limited time and resources, the team attempted to reach this goal using previously done global research about CRM systems and their implementation in enterprises and comparing with a qualitative research done by the team on the Russian market.

The team was successful at determining the challenges and verifying them on the Russian market. The challenges met on a global level showed many similarities with the ones met on the Russian market. However, the team managed to define challenges which are due to the specifics of the Russian market, like training materials availability and poor project planning in the Russian enterprises, and give suggestions for Softline, with taking into consideration western implementation practices and the Russian IT industry trends.

Thanks to the research done, the team discovered the relationship between the success of a CRM implementation and an organization’s departments ranging from IT to Human resources. As a team, we have learned that one of the new concepts to look at is Gamification, which is not yet applied by CRM providers to their software but could be very helpful in the future for CRM system implementations.
Appendices

Salesman interview

1) In the present, how do you think your daily tasks would go without having a CRM system? (only excel or on paper)?
2) In your opinion what is the future of CRM?
3) Which CRM system are you using?
4) How would you rate yourself in the usage of this system?
5) How effective was the training process and how fast did you get along with the system?
6) To what extent does the CRM system help employees collaborate with each other? Are there still miscommunications?
7) What kind of challenges related to the CRM was there during or after the training process?
8) What is one aspect you would like to change about the CRM system?
9) How satisfied are you with the actual CRM system you are using
10) If you could change your actual CRM system, which one would you like to replace it with?
11) What do you think are the biggest drawbacks from the CRM for the company? What do you think are the biggest advantages?

Technical interview

1) Which is the biggest technical challenge when implementing CRM system?
2) Do you usually train your customer’s IT specialists to be able to provide them support in the future concerning the CRM? Do you provide this support yourself? Which way is more effective for Softline and for the customers?
3) How often do you receive support requests after implementing a CRM system for a customer? What are the most frequent reasons? Could you give an example?
4) How often do you receive support requests from your colleagues concerning your own CRM system? For which reasons?
5) What is the correlation between the customization and design of a CRM system and its sustainability in the future?
6) If it was possible, what would you change in your own CRM system?
7) Which was the most successful of your CRM projects and why?
8) Which hardware and infrastructure is needed to realize a CRM project? How important is the hardware in realizing a CRM project?

9) Which components of a CRM system are the costliest and is there new technical solutions to increase cost efficiency?

10) Which of the CRM systems you distribute is the most successful and why?

11) Do you also develop your own CRM system? If yes, what is the difference between your own and the ones you distribute?

12) Which CRM system are you using in Softline?

13) From a technical point of view, what is your favourite CRM system?

14) What are the easiest and fastest CRM system you implement?

Training interview

1) How long does it take you to train someone from scratch?

2) How experienced (IT & CRM experience) are the employees you train?

3) When training, at which part trainees find most challenging and why?

4) What does the average salesman think of Microsoft Dynamics? What they like and dislike? Complaints?

5) Employees from which departments are you training to use CRM systems?

6) Do you offer the same training for everyone or does it change depending on the employee’s role?

7) Do you have experience with other CRM systems?

8) Which one is your favourite and why?

9) If you could, would you change Microsoft dynamics?

10) How much does the design of the CRM affect the speed of employee training?
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