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# MANAGING CHANGE IN THE CONTEXT OF AN INTERNATIONAL CRM PROJECT

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<b>Abstract</b>		
<p>The study aimed to empirically investigate which factors should be considered in the implementation of change in connection with an international CRM system project. The purpose of the study was to map and make visible the factors identified as challenging in the shift related to the CRM project. These are the factors the target company sales organization should invest in with its change leadership. An essential part of the study involves making recommendations to be used during change.</p> <p>The study was conducted using the case study method. A qualitative research method was used to collect the material of the case under investigation. A total of eighteen target companies' sales organization members globally were interviewed, six regions considered. The study focused on three sales organisation levels: strategic sales management, operational sales management, and salespeople. A comprehensive and adequate cross-section of the sales organization was sought through three different levels. The research material was collected through semi-structured thematic interviews, then interpreted and analyzed.</p> <p>The empirical research showed that previous models and theories were entirely valid for the most part and can be used to create guidelines for a major change in the CRM context. The importance of communication was explored in theory, as well as in the empirical part. Therefore the importance of communication as a result of the study is significant. In addition to communication, it is essential to provide users with additional tailored training. The most crucial training tasks related to the CRM system and its features are removing the tension and misunderstanding associated with the new system and the related change. The results also showed that long-term success in promoting change required the system to be fully integrated with the sales organization business processes. The technical solutions and implementations of the CRM system should fully support the needs of the sales organization. System features should not conflict with business processes. A CRM system should support and facilitate the daily activities of users in both an operational but also an analytical sense</p>		
<b>Keywords</b>		
change management, CRM, 8-step change model		

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## 1 INTRODUCTION

Companies are increasingly using IT systems to streamline their operations, and their emphasis is shifting from mere organizational support functions to broader strategic plans for companies. IT systems are, therefore, one of the tools for developing competitiveness, and often that is the overriding reason for investing in them. IT system needs vary significantly between different business and support functions of companies. There are significant differences in the characteristics, implementation, use and maintenance of IT systems. Some IT systems are very limited in their features and uses, such as a separate shift planning system. Extensive IT systems, in turn, include, e.g. the company's economic, sales and production systems, which cover and affect the company's activities on a vast scale.

Operational business systems are perhaps the most critical IT systems for the operational activities of companies. They aim to improve operations by automating manual work and reducing material and storage costs. The most important subgroup is the ERP systems, SCM systems and CRM system, which cover a vast range of the company's processes and functions. (Tiirikainen 2010, 13.)

From an organizational point of view, the implementation of almost any large-scale business system is also a change project. Therefore, in the face of intensifying competition, new, more efficient information systems are not always that simple. The cost of implementing the technology can be very high, and a fully successful deployment is still difficult. The measures needed to adopt new technology can lead to resistance increase in the organization. The rise in resistance makes change more difficult.

This study examines what factors influence a CRM project-related change in the target company's sales organization. What makes this study interesting is that the degree of novelty of a newly implemented CRM system in a sales organization is high. Although CRM technology has been around for a long time and has been

used very widely around the world, only now does the system become a global sales tool for the case company. This CRM system brought to the sales network is not just new software, but also a completely new approach to the sales process. Therefore, both the degree of technological innovation and the level of functionality are high for the sales organization.

### **1.1 Research objective and structure**

The study aimed to empirically investigate which factors should be taken into account in the implementation of change in connection with an international CRM system project. The purpose of the study is to map and make visible the factors identified as challenging in the shift related to the CRM project, to which the sales organization should invest with its own change leadership. An important part of the study involves making recommendations that can be used during change. The results of the study are used to achieve a better degree of implementation of the CRM system for the global sales network.

The topic is very interesting because a lot has been written about the failure of CRM deployments. According to Finnegan and Wilcocks (2007, 23) the implementation of a CRM system is not just about installing the system but about consolidating its use in viable, formal, and informal organizational structures, as well as personal and workgroup processes. Merely installing the system does not guarantee the system is rooted in the sales organization. The deployment consists of a technical installation and change management behavioural models. Also, according to Oksanen (2010, 55) CRM project should be seen as a change management project.

Only a few organizations succeed in implementing CRM systems and related new ways of working. Projects are estimated to fail in 18-69% of cases, depending on the source (Edinger 2018). The main reasons for failure are the lack of commitment from top management, the strategic importance of the project and the challenges related to change management (Oksanen 2010, 50-51). Implementing a CRM system for a sales organization is a business

transformation project that creates a key relationship between the sales process and the CRM system. Often a relationship is unique because each organization has its own needs. The success of change management depends on many factors, and these factors will be reviewed in this study. The study examines the scientific literature on the topic and examines related scientific theories on the basis of empirical research. The literature on the subject is commendable, as the subject has maintained its position as an interesting research topic in recent years.

This study examines change management theories in the context of the CRM project. The central theme of change leadership in research is employee resistance to change and its formation during change. Resistance comes from change, and resistance from employees tends to maintain the prevailing state of the organization. Change management has sought to address how and why employees do resistance and how it can be prevented in the change process (Ford et al., 2008, 362). Change management should be included in all stages of change and look at how the change process should be considered as a whole and what the whole consists of.

Change management should solve challenges and find ways to implement the change caused by a CRM project in the most user-friendly and sensible way. Because of this, the study seeks to understand the aspects of CRM system change that affect people at different levels of a sales organization. This means mapping out issues at varying levels of the sales organization with CRM system changes. A sensible implementation of change should enable the long-term use of an internationally large-scale CRM system. There are factors in the review that play a key role in the implementation of change in the target organization. The main question of this study is:

“What key change management factors a sales organization should consider in the context of an international CRM project?”

The aim is to find answers to the question through scientific theories, previous research, and empirical research. To be able to examine the research problem in more depth, two clarifying questions were added to the study: (1) What factors contribute actual rooting of the system in sales organization?, (2) How can resistance to change be affected?

**Research structure.** The study starting point begins with an introduction that sheds light on the main backgrounds of the study and its necessity from the case company perspective.

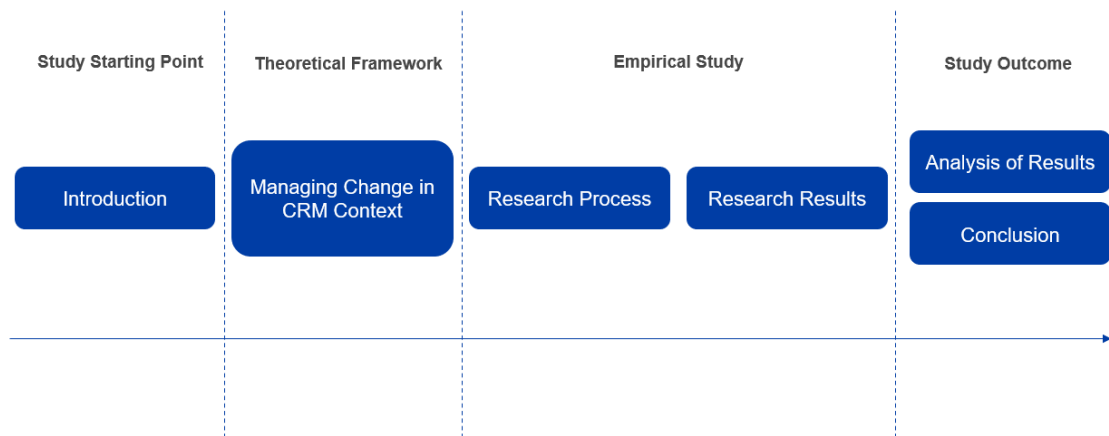


Figure 1. Research framework

According to Figure 1, the Introduction part also addresses the research problem, its limitations, and the research questions derived from the problem. At the end of the chapter, the research approach and the data collection method are used to collect the material and solve the main research problem.

The theoretical framework present the relevant literature and previous studies. The reference framework of this study, i.e. the theoretical background, is formed by the most important factors for the success or failure of the implementation of the change concerning the CRM project. These factors include change management in the context of CRM. The theory review begins with change management and the tools and methods presented by change management

theories. The study of the theory continues with the CRM system tasks and challenges.

The empirical study is the fieldwork phase of the research process, in which material relevant to the research problem is collected and analyzed, and the results obtained are presented as research results. The change has already begun in the case company, but it has not yet been fully implemented. Thus, the purpose is not to study the success of change after the change process but to seek answers on how change management can be best utilized in the organization during the change process. The goal is to ensure the best conditions for successful change through change management. Empirically, the study is limited to the strategic management, operational management, and salespeople of the case company sales organization, as they are users of the new CRM system and are primarily affected by the ongoing change.

Study Outcome, the last section of the study brings a solution to the research problem and explains what it means for the research problem. This chapter examines the work and its success as a whole and considers the relationship between the research results and the theoretical framework.

## **1.2 Case company**

The Case Company of the study is a large Swiss industrial technology and manufacturing company called Sulzer, which has a global operation and employs more than 15 thousand individuals. Company production and service network spread across the globe more than 180 locations. Sulzer generated sales in 2020 was 3.3 CHF billion (Sulzer 2021). The company was founded in 1843, and the company headquartered is in Winterthur, Switzerland.

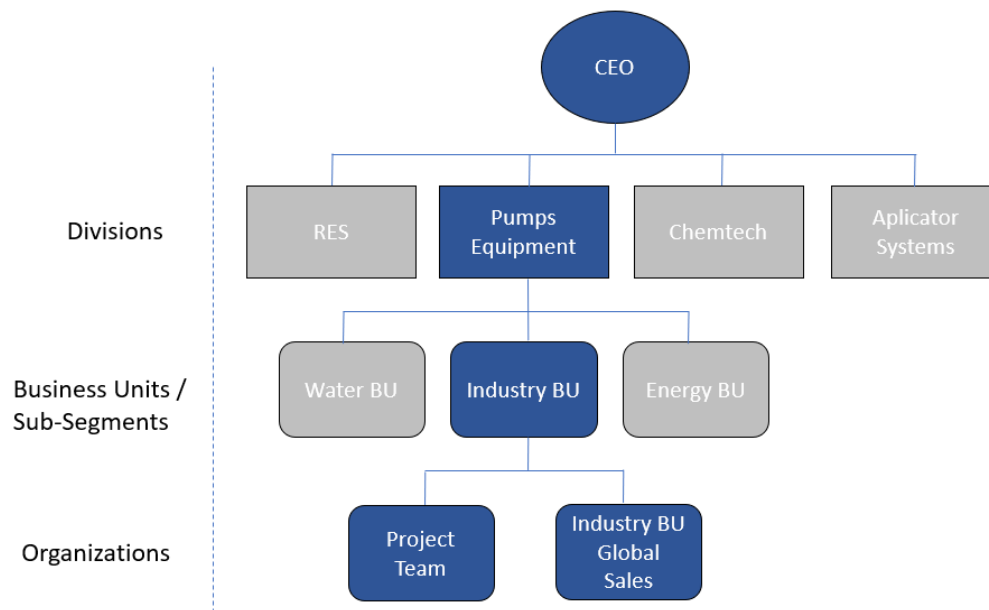


Figure 2. Organization chart.

According to Figure 2, the structure of the company consists of four divisions, which are:

1. Rotating Equipment Services (RES)
- 2. Pumps Equipment**
3. Chemtech
4. Aplicator Systems

The Pumps Equipment division is divided into three sub-segments, which are:

- 1. Industry BU**
2. Water BU
3. Energy BU

The CRM system implementation project in this case study is global, covering the entire Pump Division, and will be launched step-by-step for all business units. Each business unit has its own project organization that implements the goals set

for the project. This study is limited only to the Industry Business Unit, as the business unit's sales organization follows its own sales strategy and operates completely independently.

Pumps Equipment division launches several IT projects each year for business units, most of which are changes at the software level. The Salesforce CRM system project for Industry Business Unit covers all sales offices internationally, located in more than 30 countries and covers hundreds of users. With this change in the CRM system, the Industry Business Unit aims to increase the transparency and efficiency of the sales process, improve the customer experience and productivity. The benefits of the project are considered better customer visibility, satisfaction and retention, a reduction in manual work, the use of data for analytical purposes and the maximization of turnover.

The pre-phase of the project, which included steps such as defining CRM project needs, project planning, system supplier identification, software comparison, software selection, software acquisition, users training, and system piloting, have already been done during 2018-2020. In April 2020, the final phase of the project, the introduction of the system, began.

At this point in the project, Industry BU's sales organization has a general understanding of what a CRM system is and what its core purpose is. All sales organization levels, such as strategic management, operative managers, and salespeople, use the system almost daily. Most users are not yet aware of the full scope of the system and its capabilities. The users include individuals with a positive attitude, with a sceptical attitude, and individuals with a negative attitude. The actual rooting of the system in a global sales organization has not yet taken place. The purpose of the study was to find out in this stage what kind of factors influence the successful outcome during the implementation of the change.

### **1.3 Research method**

The research method of this study is a case study in nature, in which the implementation of a case phenomenon, change management, in the context of

an international CRM implementation project. According to Laine et al. (2007, 9), all empirical studies deal with cases. However, in a case study, a case is understood differently from, for example, a quantitative study, where a case is a statistical unit. A case study is a thorough and accurate description of a phenomenon under study.

This study examines the key factors that an Industry Business Unit sales organization should consider during the implementation of an ongoing change. The purpose of this study is to identify and describe the factors that influence the implementation of change in a global CRM system project. The global CRM implementation project is examined from the perspective of change leadership. The study focuses on three levels of the sales organization, which are strategic sales management, operative management, and salespeople. The study is commissioned by Sulzer Pumps Finland Oy, taking into account the Industry Business Unit's global sales organization.

During the study, the case phenomenon of the CRM system implementation will be described and clarified at a general level. An important part of the study involves making recommendations that can be used during change. Recommendations are created using existing theories to which phenomena found in the case organization are applied.

Laine et al. (2007, 10-11) states that case studies are characterized by the uniqueness of the phenomenon under study and the interpretation of the phenomenon in its own environment and time, which, however, the researcher is unable to influence. Learning and pragmatism are very strongly involved in the case studies. The researcher seeks to explain the cause-and-effect relationships of the phenomenon under study and thus increase an in-depth understanding of the real phenomena. A qualitative research method has been used in this case study, and the empirical part of the research was carried out through personal thematic interviews. The interview material was collected in its entirety during the study.

## **2 MANAGING CHANGE IN CRM CONTEXT**

This part of the study reviews previous research on change and change management. The theoretical study reviews focus on change, its understanding, and attitude towards it in the context of a CRM project. It is important to look at change and its overall occurrence in organizations. Examining the change and the underlying issues and components of the issues it brings will help understand how these components and issues affect the implementation and rooting of the CRM system. The aim is to link the general solutions and models of change leadership to the implementation of the CRM system so that the more general change leadership models can also be utilized in the empirical research section. Above all, the aim is to examine how the previous theories of change leadership can be applied to change in a practical way of CRM system implementation. The second part of this chapter focuses on a general description of the CRM system, its aims, purpose and challenges. The purpose of the review is to build a connection to the change in the CRM context and the resistance it creates. Change is, therefore, the unifying element of everything reviewed in this chapter.

### **2.1 People and constant change**

Change is taking place within companies at an ever-accelerating pace, and thus the systematic and smooth implementation of various changes in the company organization is becoming an increasingly important part of companies' competitiveness and maintenance. Change is the universal constant in the modern business world. The success of change management in an organization depends on how well people in the organization understand the reasons for the change, the process of the implementation of the change and what is expected of them once the change is implemented.

Changes are commonplace for people and organizations. Organizations are in constant motion. They evolve and grow. They face difficulties and have to change their behaviour. They shrink some parts of their operations and expand others. Organizations can completely change their industry, area of operation, and

practices. In addition, they can apply new types of techniques. (Juuti 2013, 179.) Changes can occur in technology, customer expectations, legislation, the supply chain, the media, or the competitive environment (Paton and McCalman 2008, 10). Organizational change is seen as a key factor in organizational development. Through change, the organization will be able to achieve efficiency and performance even better and meet the set goals (Kafka et al., 2019, 7261).

According to Paton and McCalman (2008, 7), organizations ignore change while ignoring their own future success. To survive in a rapidly changing world and business environment, an organization must have the ability to perceive a number of possible scenarios. Almost every modern organization has either faced or will face a number of challenges that create a need for internal change.

According to Ulrich (2007, 189) both, winners and losers are increasingly faced with a change that cannot be fully predicted, cannot be fully prepared for, nor can it be fully controlled. The primary difference between winners and losers is not in the pace of change but in the ability to respond to the pace of change. Winners have developed the ability to adapt, respond to and learn from change. Losers, on the other hand, spend a lot of time trying to halt and monitor changes instead of reacting. Thus, changing trends force organizations to review their own strategies and practices at intervals. Surviving in a new market environment is often the biggest compelling factor in reviewing one's own practices. Managing change is often a very tough test for a leader who has to take an organization through it. Often, managing change is both a necessary and a very complex matter. It contains many steps as well as time-consuming for a long time.

Underestimating these two things can lead to poor results or complete failure. Organizations both change and remain stable, and in these situations, people's feelings and expectations must be taken into account so that the organization can succeed and plan actions as change occurs (Klarner et al., 2011, 332-333).

According to Juuti and Virtanen (2008, 110), change always evokes emotions in people. Sometimes these emotions are positive but often negative. Each of us lives within our own unique world. People have encountered various events in their lives and worked on them in a certain way in their minds. So, people are

made of experiences. Experiences are mainly emotional images that have helped to take over the world when encountering a particular event. Experiences are shaped in the human mind into beliefs. As beliefs, experiences are related in a consistent way. Beliefs affect human thinking and perceptions. Indeed, a human mind is a storehouse of experiences and an active and independent modifier of experiences and ways of thinking.

The challenge for people is to live their lives in a world where they face events. The problem is that different people can interpret the same event in very different ways. While the language in use may be an opportunity, it can also be a threat. People may not always know how to put their thoughts into words, which is why many things go unsaid. People experiences and the compilation of interpretations of them are a summation of the understanding achieved so far. Often it automatically helps to avoid nasty surprises. If the situation is familiar, we will respond to it in the right way. Then when the situation is completely new, the reaction may not always be right. As a result of upbringing and guidance, many things become a matter of course, allowing the reaction to come almost completely automatically. In addition to this, a person lives in relation to other people and things. These relationships each form their own "world". Because of these "worlds," individuals cannot easily change their behaviour because it has made commitments with other people. If the approach is changed, relations with others will have to be renegotiated. If the course of action changes without notice and explanation, the person should become unreliable in the eyes of others. (Juuti and Virtanen 2008, 111-112.)

So Individual is in constant dialogue with himself. Dialogue evokes cognitive structures and ways of perceiving things. Cognitive structures are created in part automatically. Through it, the mind connects independent parts together in an effort to create logical entities. Parts that does not fit into a logical story are also automatically removed by the mind. Thus, change is encountered on the basis of experience and socially defined practices. New events are explained through old experiences. If the new events are not compatible with the old experiences, the mind changes the content of the new events without noticing the person so that it

is compatible with the traditional experience. If, on the other hand, a person finds that it is a new event that cannot be interpreted through old accounts, one must take into account what others think of the event and its consequences.

Sometimes, on the other hand, the human mind shapes things to make change easier. (Juuti and Virtanen 2008, 113-114.) Therefore, when planning and implementing changes, listening to the views of individuals is paramount, as they have the experiential knowledge and understanding of how change can best be implemented to achieve the best possible outcome for both staff resilience and organizational goals. (Luomala 2008, 13.)

Piha (2017, 158-159) approaches the issue of change in difficulty from an organisational culture perspective. If an organization suffers from a poor ability to respond to the speed and challenges of world change, then there is no other way than to influence the culture of the company. The culture change process is very complex and almost impossible. However, culture can be persuaded by the following things: by changing the structure of how it is organized, by changing strategy, by changing mission, by changing the purpose of existence, and of course, better leadership. People assumptions change through actions. What is rewarded is strengthened. It is also important to simultaneously examine the company's relationship to the needs of the three target groups: customers, shareholders, and employees. Company leadership and individual leaders have a significant impact on company culture. What the leader pays attention to becomes the ultimate mechanism of cultural change: what the leader values shows people what is important. Thus, if a leader shares a short-sighted way of thinking, low emotional intelligence, and an inability to build trust, organizational culture reflects the same things. It is challenging to change culture with old management models. If the people who take the new way of doing things themselves have not truly accepted it, change is almost impossible.

## **2.2 Resistance to change**

The human mind needs cognitive stability. When fundamental assumptions are questioned or challenged, it creates anxiety and defensiveness. This is where

resistance to change often begins. In this sense, shared assumptions that create the culture of a group are, from the perspective of the group and the individual, a kind of cognitive safety mechanism that allows it to function. At the same time, culture at this level produces identity for group members and determines values related to self-esteem. Cultures tell group members who they are. (Piha 2017, 163.)

The approach of Piha (2017) and Juuti (2008) is very similar; however, with the difference that Juuti looks at the impact of change on the individual and Piha has a collective approach. However, the narrative of both authors tells about the nature of resistance to change. Examining change and its structure is equally relevant to both the individual and the group, where understanding those structures helps to understand why it is so difficult to change an individual, and especially culture. Both emphasize that change is always awkward and involves nasty feelings. Both authors emphasize people's need for cognitive stability. Stability is thus a state where the environment, processes and people are familiar and safe. If this is not the case, there is usually resistance to change. There are almost similar shared values, identities, and structures among an organization's social group. Change is, therefore, almost always a threat to those groups.

Change resistance is the biggest threat to a change project. According to Ford et al. (2008, 363), resisting change in an organization is never a rational act backed by a sensible structure or strategy. The most obvious disadvantages of change resistance are slowing down the progress of change or the failure of the whole project. Slowing down alone can also lead to failure. There may be several reasons for the slowdown in the change during the process if the resistance is not properly considered. Changes generally cause fear, and if the process is poorly managed, employees can cause great difficulty in moving forward through their own actions.

According to Juuti and Virtanen (2008, 116) change is therefore almost always a threat to the human self as well. Change is an attack on the ego. Change is thus a threat to the image an individual has created of himself. There are always

negative feelings associated with change. Individuals who were subject to change reflect the negative emotions that have arisen outside themselves. When each person takes advantage of some degree of emotional reflection to maintain the balance of their own mind, a situation of change may entice them to see someone as evil or strange. Conflicts, as well as bullying in the workplace, are a common reaction to change.

A commonly asked question is why people do not change their actions even when management is higher in a hierarchical position and often more highly educated presents logical analyzes. This may be due to the fact that people rely more on their own experiences and observations than on analyzes made by management. In addition, management is often not considered reliable. People may feel that management is trying to present arguments that are beneficial to them but negative to employees. There may be various reasons for this. First, management may perceive the same organizational issues as much more positive than other employee groups. In addition, management and other staff groups may use very different languages from each other. Employee groups may experience management speaking an incomprehensible strategic jargon. This issue underscores the importance of a cross-organizational change in communication culture. (Juuti and Virtanen 2008, 141.)

Leading people effectively is a difficult skill. It is based on the reality of the people in the community. It is driven by the energy that people have in their efforts to eliminate the problems associated with their lives. The power of change stems from people's efforts for the better. It is the job of management to give this a verbal outfit and thus feed people's imagination of what it is like when that better state of being is achieved. It is also the job of management to travel with people the arduous journey it takes to achieve that distant vision. (Juuti and Virtanen 2008, 145.)

The implementation of a strategy is often tangled because management assumes that people behave rationally, consistently, and in a controlled manner. However, change is always associated with emotions - enthusiasm and joy, doubt and

giving up. Success is determined by management's desire and ability to see what motivates people. The ability to innovate arises from understanding direction, genuine interaction, opportunities to influence, and identifying achievements. It requires resilience and faith in survival from all organizations, including management. (Valpola et al., 2010, 105)

Resisting change in a CRM context is often associated with work practices and tools. According to Oksanen (2010, 61) rationality and consistency are not the cases as people are forced to change their safe and familiar ways of working. The ways of working in the work community are considered to be very personal matters, and they cannot be changed in a declarative way. An experienced professional with long experience in the company may not want to listen to a young superior who will unilaterally inform them that "your work practices and tools will change from now on." Oksanen continues that the completion of the change should start with real interaction and the opportunity to influence. Also, according to Jones et al. (2005, 368), engaging and developing people, communicating change and involving them are things that should be considered when from the outset, planning change. They help people tolerate the uncertainty and pain of abandonment associated with change and accept the new operating environment.

**Kotter's 8 Step Change Model.** According to Kotter (2007, 1-2), an organizational change project is often a complex process and not an event as many managers think. While the process includes many important components such as culture, systems, and strategies, the most challenging element is human behavior. The best way to change behavior is to achieve a level of emotion that can be achieved by showing people the truth that can be achieved through change. Instead of logical and analytical messages, management should rely on people's emotions. The change in human behavior does not proceed according to the "analyze - think - change" way. In reality, it is more like the "perceive - experiment - change" way. It is more natural for people to behave on the basis of emotions than rationally. Emotions are the heart of change; they affect how

people behave in change and through that, they also affect the realization of planned change (Kotter 2004, 21).



Figure 3. Kotter's 8-Step Change Model Kotter (2004, 16)

According to Figure 3, major change initiatives should be structured as a process almost always consists of 8 steps that build on each other. That change process should be approached as continuous and not linearly (Cameron and Green 2015, 116).

**Step 1: Create a sense of urgency.** There must be a clear and justified reason for any change in the organization. Once the cause has been identified, the next step should be sensible communication to the entire organization to initiate the change process and related activities. While the task seems easy, this is not the case for many reasons. The reasons are often a large number of managers and a small number of leaders. Managers may also fear the emergence of resistance to

change, resulting in chaos. If an organization's financial situation is good, it is very difficult to get people out of their comfort zone to inspect the environment objectively and critically (Kotter 2007, 3-4). According to Kotter (2004, 49), all major changes must begin from the impact initiated on the emotions of colleagues. Keeping an impact can be information that changes immediate action. In other words, companies need to create a sense of urgency that lifts people off the couch and encourages them to act at the moment. The feeling of urgency forces people to look at the issue collectively, which creates a good foundation for initiating change. The focus in the first stage must be on the emotions and not on a rational approach. The change can be defined through some real example or object that can be more visible. During change, the right priority must be given for dissatisfaction and resistance. Efforts must be made to suppress resistance through proper guidance, communication and management.

**Step 2: Create a guiding coalition.** After the first stage, once a sense of the need for immediate change has been created, a core reformers group should be created. The group should be composed of members of the organization who are trustworthy, have extensive networks, authority, and the ability to make a change. These people should work closely together in a team and support each other in every possible way. The main goal of the group is managing change during complex processes, including all steps. (Kotter 2004, 53-58.) According to Kotter, companies that fail at this point often do not understand how critical it is to create a core group. Change may begin with one or two visionary individuals. It is often thought that this small core group is enough, especially if the top management of the organization is committed to the project. In reality, and especially in larger companies, a much larger group of enthusiastic people is needed. It is very important to bring together members with decision-making and influence power. Someone in practice should form that group, create a common idea of the need for change, and initiate collaboration. A core group without a strong leader may make some results in the early stages, but later resistance to change may reverse the direction (Kotter 2007, 5).

**Step 3: Develop a vision and strategies.** Ideally, the core group creates a clear, simple, real, and inspiring vision and the right strategies to support it. A mere thought or idea of change is not enough in its realization phase, even if the core team agrees. Therefore, the task of the vision is to arouse interest in change, but at the same time, through it, a big team of people should understand what it is all about. The vision cannot be too complicated or heavy. In the same way, a vision cannot be something vague and ambiguous. Otherwise, its effect is likely to be the opposite. Creating a vision may start with one person. However, the final version of the vision would be good to be the joint result of the core group of reflection. A good vision should fit on one page and should be communicated in five minutes. (Kotter 2007, 5-6.)

**Step 4: Communicate the change vision.** At this point, the vision must be communicated through the organization. Communication must use all the company's channels and be simple and straightforward. Communication is essential and helps people understand the meaning of vision and the tasks associated with it. Through this, interest in the idea, as well as its support, should arise. (Kotter 2004, 107.) If the communication process is weak, the benefits of even a good vision may not be achieved. A one-time management opportunity or a message sent to everyone does not result in the adoption of a vision at the organizational level. Communicating a new vision should be a daily routine for the people involved in the change process. Vision communication must be organized in all channels in the company and also in those channels that are used for so-called pointless communication. Taking the vision forward must take place both through communication but also physically. Individuals who have promised to be visionary ambassadors should also act accordingly. (Kotter 2007, 6.)

**Step 5: Remove barriers to action.** When taking the points of the new vision to implementation, it is important to consider and remove all barriers. Barriers can be small as well as large. Some barriers may only be on the mental level of individuals, while others may require the implementation of concrete compromises. Barriers can be organizational structures or people. (Kotter 2004, 129.) Individuals and managers may think that vision can damage their position

or the financial success of a company. This is why it is very important to maintain a large core group that are collectively able to remove both small and large barriers. The main motive for the core group must be to protect the vision in every possible way. When a core group is experiencing a problem, the task is to encourage people of real change by helping to remove the obstacles that come up. (Kotter 2007, 7.)

**Step 6: Accomplish short-term wins.** It often takes a long time to go through big changes. Kotter (2004, 155) thinks it is very important to strive to create intermediate goals and wins. Wins are essential. They increase the trust of others, attract new resources and encourage joint efforts. In the same way, wins take power from sceptics and resistance to change. Through wins, change leaders receive feedback on vision and strategy. The purpose of the gains is to maintain the correct rate of change (Kotter 2004, 157). Without intermediate goals and wins, there is a risk that people will start to think that the process of change has either slowed down or come to a complete halt. The process of change can face major problems if there is no obvious, unambiguous and meaningful outcome for people. Achieving goals shows a person that they are doing the right things and that there are still things to do. Light pressure, in Kotter's opinion, may often help in the process. Continuous review of the situation forces individuals to approach change in an analytical way. Large-scale change projects rarely succeed without intermediate wins. (Kotter 2007, 7-8.)

**Step 7: Build on the change.** Achieving intermediate goals and wins gains for change leaders should not stop but move toward the full profit of the change process. The realization of the vision should happen without stopping. After the first results, people's will to win should grow. Change leaders should also carefully consider the next steps. According to Kotter, the core team of the change project may have a tendency to declare victory too early. In practice, with the first results, people believe that all goals have been achieved. (Kotter 2004, 177-179.) Tired people are ready, so to speak, go home. Members of the organization who were against change from the beginning may often take advantage of the situation. After declaring a victory, they seek to bring "traditions"

back relatively quickly. Therefore, it is very important to be objective in terms of “victories” and declaring a “war” should only occur when everyone is absolutely certain that the new practices are fully rooted in the organization. (Kotter 2007, 8.)

**Step 8: Institute change.** In the final phase, the core team forces the new operating culture to take root through the organization. A new organizational culture, including common values and collective norms of behavior, emerges over certain periods of operation over a relatively long period of time. As long as the results of change are not officially rooted in social norms and common values, there is always a risk of losing the results achieved. People should be given a clear message that the new success achieved is a common result. In other words, the individuals must be told and shown a clear causal consequence of the fact that everyone had a point of change. It should be openly shown that people’s attitudes, use and approach are the reason for a better outcome. Otherwise, people may not be able to embrace a new culture like their own. One of the best ways to consolidate the new organizational culture is to provide career development opportunities for those individuals who are ambassadors for the new vision. Change in organizational culture must be done only at the end of the change process and not at the beginning. (Kotter 2004, 200; 2007, 213.)

Kotter’s 8-step Change Model shows that the change resistance must be given its own value for each step. Kotter uses communication through a guiding coalition as one important way to promote change. According to Piha (2020, 5.1), Kotter’s 8-step Change Management Theory has been built to suit his time. In a world of rapid change and transparent, open communication, it is at times obsolete. In today’s rapidly changing world, change is not a temporary but a permanent state of being, which is why organizations need a different way of perceiving change. The organization and its management must adapt to the world, as the world does not adapt to the goals of the organization. According to Piha (2020, 5.4), Kotter as an organizational theorist, has forgotten its most important thing, communication is the most effective tool in the world for change;

communication is the main force of change. The larger the organization, the more systematically it must require ongoing discussion.

The way in which internal communication is perceived prevents one from understanding the value of ongoing conversation. Maximizing efficiency prevents tolerating the demands of ongoing debate. According to Piha (2020, 8.4), just a few companies' internal communication works excellently. That's because the notion of internal communication is based on an outdated toolkit like Kotter's 8-Step Change Management theory. Communication is not one tool in the toolbox but the main tool used to make the change. In situations of change, interaction, dialogue, and building change together are key factors in a company's success.

Valpola (2004, 44) also emphasizes communication as an important main tool for promoting change. The organization should know what is needed to implement the changes and how the change will be made. The messages of change must go from the organizational layer, from the superior to the work team, through the entire organization, reaching everyone working in the company in a sufficiently short time. Management should state the vision, goals and justify why change is needed. According to Pirinen (2014), communication should go in all directions: both from the top-down and from the bottom up, and also sideways. Simply passing things hierarchically from top to bottom is not enough; for top management, things look very different than for an ordinary employee. Top management must make the views of staff heard, and middle management has a key role to play; bring message and insight from the bottom up.

Communication is strongly involved throughout the change process, it is part of all measures, the so-called another side of the coin: action and communication. The bigger the change and the greater the fears about the consequences of the change, the more important it is to support the achievement of goals through communication. Valpola (2004, 62-63) lists the most important issues related to change communication as follows:

- Every message must be true. Messages need to be able to be honestly communicated in the same way to different stakeholders.
- Close-to-close communication is essential. Employees listen carefully to how management, middle management and their own team talk about things in parallel; like-mindedness and parallelism of messages create credibility in messages.
- A lot of repetition is needed to get the message across.
- Management trust capital supports communication in situations that require speed
- Clarity of the message. The reasons for decisions must be clear. Consistency of messages is important.
- Reaching out to the person who needs the message. Answers to the question “what does this mean for me?”

Training, various seminars, and programs also are good ways to promote change. They can be used to learn about change, develop the necessary tools and simulate change. Coaching and training provide a neutral foundation for the new. Parts of the program can easily visit different parts of the organization, do project work, or mirror a colleague. Representatives of another country or unit can use their own example to tell where and how they have succeeded. (Valpola 2004, 45.)

Networking, the collaboration of different expert groups, effectively accelerates change. When people from several departments and project teams regularly go through a change project, share their own experiences, develop solution models together, receive support from each other as change agents, change can be taken forward in different parts of the organization in parallel. Summaries of these groups provide management with useful information about change and help identify areas where further action, monitoring, or intervention is needed to implement change. Even those parts of the organization that have been given a longer time to implement change learn from other professionals how things can be affected. (Valpola 2004, 45.)

### 2.3 CRM

Customer relationships are the foundation of every business. Without relationships with customer relationships, no company can operate. Customer relationships give the company the opportunity for profitable sales and access to a variety of resources. Equally, customer relationships require resources on the part of the company, as they require long-term development work, continuous maintenance and different investments. To succeed in customer relationships, a company must have a clear customer strategy. The importance of managing customer relationships has been recognized and documented in many sales and marketing literature. (Ford et al., 2011, 2.)

According to Grönroos (2009, 30) a single interaction involves substances that can form the basis of a relationship between the service provider and the customer. If there are several interactions, either continuously or intermittently, and if both parties so wish, a relationship may be established between the parties. If the customer feels that there is something special and valuable in the contacts between the customer and a company, the relationship with the customer can be strengthened. Experiencing connections as a relationship is not enough to make customers loyal, but it is a key part of loyalty. Loyal customers are almost always profitable. Grönroos continues that customer relationship management is a profitable activity from a business perspective.

Nowadays, all companies operating in global business networks are interdependent and develop their key relationships. The most important relationships are often with customers, suppliers and distributors. Companies seek to obtain the necessary resources and activities from other companies through key relationships. Companies strive to steer relationships in their desired direction, but no company can fully control the relationships across the whole network. Every relationship with a customer is often unique and managing its relationships requires a tailored approach. (Ford et al., 5.)

Customers in the business landscape are very different. Some are clearly more important than others. Therefore, a similar approach cannot be applied to them. Some customers are more passive than others. However, there are no completely passive customers. From a supplier's perspective, customer relationship management must be much more than the pursuit of achieving productive sales (Ford et al., 6). According to Grönroos (2009, 48) when a relationship is formed, customers are always customers - and they should be treated as customers, whether they buy at a certain point in time or not. Companies that understand this and act accordingly treat their customers understand the importance of customer relationship management.

Customer relationship management requires an understanding of what the customer actually wants. The company should understand whether it can solve the customer's problem by using the resources and capabilities available in the company. Some customers may be important because, through a common relationship, they are able to produce a new solution or technology that can be used in other relationships. Other customers are able to place large orders through which the company's cash flow improves. The company may also have customers whose orders are not very large in terms of volume but whose return is clearly higher than others. Therefore, an organization's customer relationship management requires selecting and maintaining an optimal customer base. Through it, the company strives to find the best path to success. However, interaction with customers is often a unique as well as a complex process. (Ford et al., 7.)

Because customers differ a lot from each other, companies, therefore, have multi-level relationships. A simple relationship can be described as a one-time interaction process involving a fast, low-value transaction in which a customer buys a product or service. Some businesses are built so that their total sales consist of small, simple relationships that alone are not important. However, together they are vital to success. Bilateral relations can also be by far the most important. Some relationships are important because their core buying and selling volume are significant relative to the whole. Other relationships are

important because through them, the parties seek to achieve technological or economic progress. Most important relationships with customers are often very complex. They include people, technology and investment from both sides. They often require deep involvement that can result in the development and deployment of products, services, or processes. (Ford et al., 14-16.)

However, business is not about doing things just for customers, but about doing things with customers. This creates a real customer relationship, as a result of which both parties will be able to benefit from the relationship also in the future. Customers and suppliers have always been in a key relationship since the first barter transactions were made. The important decision is not whether the company needs customer relationships or not. An important decision is which relationships should be developed and how they should be developed. An existing relationship is often because companies have had a relationship in the past. Similarly, the future relationship depends directly on what is happening at the moment.

Few transactions between a supplier and a customer occur completely without any relationship. Not all customer relationships start or end positively. A relationship can equally lead to cooperation or conflict. Some relationships certainly produce challenges and problems for the company. Challenges can be related to cost, loss of revenue, or can be detrimental to a company's long-term development. The parties may see the same relationship in a completely different way. Factors, such as continuity and content, separate customer relationships from an occasional business meeting. Content in this context refers to a complex interaction on both sides aimed at a change in a relationship and its connections to others. Continuity means joint commitment, investment and adaptation of the parties. It is also typical of continuity that the current interaction is based on past experience and the goal of maintaining it also in the future. (Ford et al., 44-46.)

Maintaining an ongoing customer relationship is a complex and often problematic task from a management perspective. A key customer relationship limits independence and autonomy. One-sided management of relationships is almost

impossible due to commitment. Managers who are responsible for customer relationships often need to spend much time maintaining an ongoing relationship. Their overriding task is to ensure that the things offered and promised remain at the required level in the future. (Ford et al., 53-54.)

From a company perspective choosing the right customer base and maintaining it is a critical factor for successful business management. Managing individual relationships can be both unique and complex at the same time if the same issue is reviewed from the perspective of a global organization, the complexity of the context increases. Many organizations have leveraged a variety of technologies and information systems to manage customer relationships. One of the most important is the CRM system.

### **2.3.1 Understanding the CRM system**

According to Grönroos (2009, 59), by utilizing information technology, companies can show their customers in many ways that they know and appreciate them. No matter how close a company gets to serving customers individually, it should always hold one-on-one customer meetings or get customers as close as possible by using information technology. If the person interacting with the customer has first-hand information about the customer, the interaction can go well. Well-managed interaction situations can lead to loyalty, which in turn affects a company's profitability.

The term Customer Relationship Management has been in use for about 30 years. Since then, many have tried to determine what Customer Relationship Management means. The unambiguous definition is not very easy because it can mean many things depending on the context. For that reason, there can also be many definitions. There are many different variations and answers to the questions in the literature: What does CRM mean? Where and why is it used?

CRM can be defined as the process by which a company manages its customers and related data. CRM is also a technology that allows customer data to be

stored and analyzed for a variety of purposes. With stored data, a company is able to answer many important questions about its own customers and relationships with them. An understanding of customer needs and usage can be applied widely across the organization. (Bain and Company 2018.)

According to Payne (2006, 136-137), one of the main purposes of a CRM system is to selectively acquire, grow and maintain a profitable customer base. CRM technology provides a broad opportunity to maintain relationships in a quality way. Based on a large amount of customer data, a company is able to use that information for a variety of purposes, such as operational or analytical. This allows the best and most profitable services and products to be better targeted at the right customers.

Buttle and Maklan (2015, 16) define CRM as follows:

*“CRM is the core business strategy that integrates internal process and functions, and external networks, to create and deliver value to targeted customers at a profit. It is grounded in high-quality customer-related data and enabled by information technology.”*

Based on the definitions, CRM can therefore mean the following (Buttle and Maklan 2015, 4):

Concept: the ways in which an organization systematically manages its customer relationships. A process to manage all customer encounters such as sales and customer service. An approach to identifying, acquiring and retaining customers. A business IT system to plan, schedule, and manage sales, marketing, and customer service activities. The main purpose is to improve the long-term relationship as well as profitability. Business strategy to maximize customer profitability, revenue and satisfaction.

Companies use the system extensively for a variety of purposes. CRM functions can span many departments such as sales, marketing, customer support, customer service and more. (Merrifield 2015). The main reason why companies

use CRM systems widely can vary greatly from company to company, its needs, industry and so on. Bain and Company (2018) lists more common reasons why companies may use a CRM system:

- Opportunity to increase sale
- Deep understanding of their customers in real-time.
- opportunity to create sales forecasts
- The ability to quickly convey important information within an organization
- Opportunity to see the impact on sales of different products
- Opportunity to see sales team performance
- Possibility to extend the age of customer relationships

Not all CRM is the same. The first basic division of the classifications is made on the basis of the main customer base. There are legal differences in the business for B2B customers and B2C customers, for example, in terms of trade practices, data protection and consumer protection. The second method of breakdown relates to the main purpose of the systems. (Oksanen 2010, 23-24.)

CRM system can achieve very different goals, and they divide the system into three main uses, which are strategic, operational and analytical CRM: (Buttle and Maklan 2015, 4-12)

**Strategic CRM** - Focus on creating a customer-centric business culture. The customer is provided with higher added value than competitors. In this context, customer data is collected and documented, shared and applied across the organization.

**Operational CRM** - Focus on the control and automation of customer interface processes such as marketing, sales and service.

With the help of *marketing automation* technology, the necessary processes are automated. Marketers are able to use existing data to design and execute campaigns. The quality of your campaigns will improve significantly if the customer segmentation is done correctly. Accurate Customer Information allows

you to design unique approaches for each customer segment, customer groups and sometimes even the customer. With the help of implemented combos, the marketing department often retrieves, processes and forwards Leads for sales. It is very important that marketing automation as well as sales work together and not separately.

*Sales automation* is a widely used feature on the b-to-b side. It enables the organization of so-called Lead as well as Opportunity management. The system allows the organization to track how Leads can be converted to Opportunity and how Opportunity passes through sales stages. Lead assignment to the right seller can happen completely automatically. Forecasts are created based on the history of Opportunities and the future opportunity for seller evaluation. Functionalities such as contact management, calendaring, product selection and configuration, and quote preparation are often an integral part of sales automation.

*Service Automation*, on the other hand, enables a better approach between its service providers and customers. Various technologies enable the customer to provide faster or real-time services completely remotely. It can include providing instructions, diagnostics, inventory management, and many other services. This module also served as a place for collecting customer data.

**Analytical CRM** - Focus on data mining and identifying business opportunities. Based on all the organization's accumulated information about customers. CRM components such as sales data, financial figures, marketing data and service data can serve as a source of information. In addition to that information, other information from an external source may have been added. Properly combined data can help answer many questions such as: Who are our most productive customers? What is our most profitable segment? Which customer base is less loyal? The company is able to make important operational as well as strategic decisions using analytical CRM.

### 2.3.2 Challenges of CRM

According to CIO data (Taber, 2017), about 1/3 of CRM projects fail. The exact figure is very difficult to say and is assumed to be between 18% and 69%. The word failure in this context can mean different things. Failure may be related to CRM project schedule, budget, technology and people. Increasing sales is still the main reason why an expensive CRM project is undertaken in many organizations. According to Edinger (2018), many CRM systems are unable to improve business sales, often because companies intentionally use the system only as an audit tool and not as a CRM tool. Management sees the system as an analytical tool and, according to it, creates rules for its use. Salespeople may be forced to enter a lot of information into the system that does not improve their personal performance, but it allows sales management to build on the Dashboard they need. In the long run, if sales peoples don't see any added value from the data entered, they will no longer enter it or enter it incorrectly. Similarly, if sales experience that the sole purpose of the system is to control sales, it can lead to the system becoming hated. As a result, an organization can have an expensive system whose data cannot be trusted or used anywhere. Although the implementation of a CRM system can involve many parts of a company, it often concerns the sales organization the most (Johnston and Marshall 101, 2016).

The success of a CRM project requires an organization-wide sufficient emphasis on the project. Continuous, consistent communication and the personal change of operating methods of key personnel that supports it. As with any development task, success in a CRM project requires the setting of concrete goals, the fragmentation of the whole, the implementation of adequate resources and plans for the task, and ongoing communication. Employees may adopt a CRM story and terms but still operate in old, familiar ways. The new practices were not actually in place. Often the non-use of the CRM system is a non-technical issue. So often, the system is available, but it is not used. Usually, that inactivity is shrouded in a hurry or other familiar explanation. (Oksanen 2010, 26-28.)

Problems with the system may be detrimental to the organization's business, but there is no major immediate threat. The implementation of a CRM system is successful if, after two years, each of the following criteria is met: (1) At least 4/5 of the planned users use the system regularly. (2) The user organization is dependent on the system, i.e. the system provides the information needed to run the business. (3) The system is an integral part of the organization's information management.

The success of the first criterion is clearly measurable. Ideally, the number of users may have even increased from the original intended. The second and third criteria flash around the same thing; if CRM were to be phased out, it would cause significant problems for the business. The third criterion places particular emphasis on the CRM-related aspect of information and its management. With the help of the system, customers are genuinely known. There are a lot of different semi-wage implementations like fragmented customer registers, deficient marketing positions, occasional contact reporting and more.

It can be said that all successful CRM system implementations are excellent and effective management results. And the reasons for failure are somewhere other than the management's own doing. Indeed, the change associated with failed deployments has apparently gone unmanaged, and the end result has ended in statistics. Successful CRM deployments require strong leadership and determined action. A genuine takeover of customers is not possible if the policies and systems that support it are not in order. The best time to take care of them is immediately upon deployment and not sometimes in a vague future. (Oksanen 2010, 29-30.)

In the first CRM project, the organization introduces a completely new tool. The organization has not previously had centralized customer management tools in place, especially in sales. Loose customer registers in Excel spreadsheets and the like may be found but do not form a whole. The key challenge of the first CRM project is related to the collective inexperience of the organization. During initial use, the organization does not have a common understanding of good

practices and potential hidden challenges. The first introduction involves even positive factors. An inexperienced organization does not carry an unnecessary burden of past failures or challenges. While the endpoint of a project may not be completely clear for everyone, no assumed obstacles or bumps have been piled up along the way. Often, change also has a strong order, as it has woken up, especially in medium-sized and large companies, to make sense that it no longer makes sense without the right tools. As a result, the organization is willing to change and willing to participate in a project that supports it. (Oksanen 2010, 39-40.)

According to Edinger (2018) the company should clearly see the reasons why often a very challenging CRM project has been started and why so much energy and money has been invested in it. Then, once the reasons are clear, they should be communicated through the organization. Employees should understand that those reasons are an important part of a company's strategy. Employees should also understand that a CRM system is not a technology that helps management control them. CRM is a tool that helps sell more, open access to information and resources, and improve the view of their responsibilities better. Then, when the sales team understands the value of the tool, the company automatically gets high-quality data that allows them to make more accurate forecasts and other analytical activities. The success of a CRM project does not depend on the salespeople only. Sales management should develop joint strategies to enable both sales and sales management to achieve the goals set for the system. Managers should first be coaches for their own salespeople, where CRM is an important business tool.

In a global sales organization, other countries and cultures must also be considered. Distance is the deceleration to get over. The things that like to be experienced as problems are not them at all and vice versa. Distances do not always correlate with the number of differences. In terms of CRM projects, the biggest cultural difference is related to management. Leadership style can be very contrasting in different cultures. Policies and systems can be implemented through notification, command, discussion, and participation. Cultural differences

must be taken into account if the desired outcome is to be achieved globally. (Oksanen 2010, 43-46.)

According to a study conducted in Finland, which involved 129 managers from 125 companies, their opinions on the success factors of CRM project implementations were surveyed. According to Oksanen (2010), the results were as expected; 93 per cent of the respondents considered the management's commitment to be significant for the success of the implementation. Management engagement and involvement is understandable, as no organization-wide project without management support can succeed. Essential to the commitment is its irrevocability. In principle, the organization must stay on the chosen route. A CRM project is a typical project that requires commitment. A project often involves direct as well as indirect costs combined with its strategic importance. Starting a project again can be very difficult. In addition to communicating the big picture, companies need to be able to explain to each employee during the project what the project and the change associated with it means to employees. Commitment is not created by management but requires an understanding of the change in one's own work environment that extends to the personal level. This is one part of management involvement. Organizational change can only be led by first changing the individuals who work there. In the CRM context, changing leader means genuinely embracing new ways of working and committing to using and leveraging the solution. (Oksanen 2010, 48-50.) Goldenberg (2008, 33) also believes that management commitment and support is the most important success factor for the success of a CRM project.

Purchasing and installing a CRM system in the organization does not mean that everyone will start using it, and the organization will automatically achieve all the benefits associated with it. Every CRM project is a complex change project. Implementing it takes time and resources. From an organizational point of view, deployment must be successful to avoid major damage as well as additional costs. The role of leadership and management is a critical factor for success. An organization needs to have a clear understanding of what CRM is, why it is deployed, and how it relates to a company's strategy.

### **3 RESEARCH PROCESS**

The research started with the preparation of a research plan, which defined the content, source material, objectives and schedule of the research. After the research plan, it was time to build the theoretical part, which is primarily based on getting acquainted with the previous research literature. Making a research plan helped to better understand the scope in general, which helped take the study forward.

#### **3.1 Data collection and interviews**

An empirical approach was chosen for this study because the totality of empirical research arises from many different stages. The interactions of these stages shape each other and thus also the whole. According to Kananen (2017, 32-33), qualitative research comes into question when the phenomenon is not known, i.e. there are no theories that would explain the phenomenon under study. Qualitative research seeks the same understanding of the phenomenon. Qualitative research provides an opportunity to gain an in-depth view of the phenomenon. The results are often valid only for the target case. The interviews are suitable for where the area is not familiar, and the topic of the study can provide complex and multi-directional answers. Equally, the interviews are appropriate when trying to clarify and deepen the topic. (Hirsjärvi and Hurme 2004, 13-14.)

Qualitative material was conducted for this study in the form of interviews and was collected from three different levels of the case company sales organization. The data collection method of this study was thematic interviews. The interviews took the form of semi-structured thematic interviews, during which additional specific questions were asked if the need for them was seen as the interview progressed. Hirsjärvi and Hurme (2004, 48-49) see that during the interviews, additional questions can well be asked if it is possible to find new and interesting topics. They also clarify that an interview, and especially a thematic interview, is a good research method to verify people's attitudes and feelings.

The interviews were conducted taking into account the global sales organization as a whole.

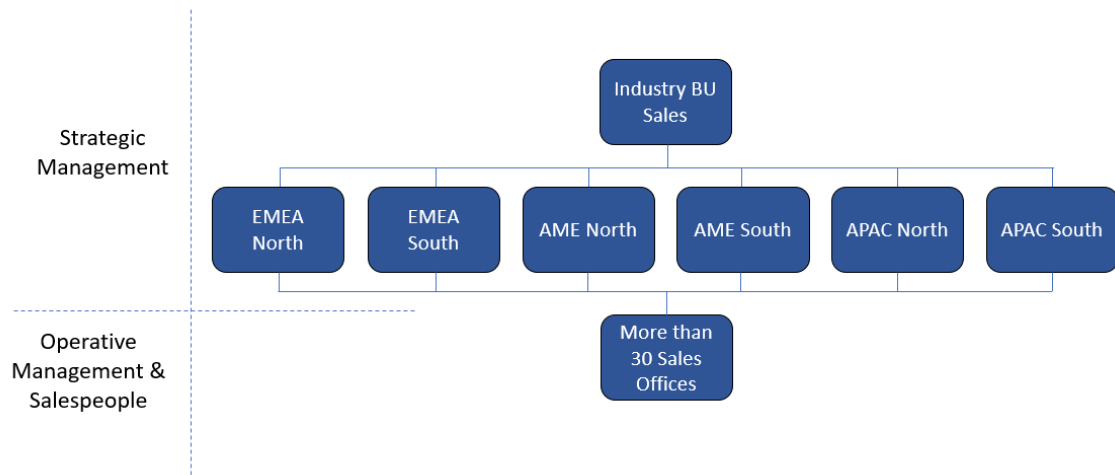


Figure4. Industry BU Sales Organization

According to Figure 4, Industry Business Unit Sales organization is divided into six sub-regions. Interviewees were selected from all six sub-regions which are EMEA North, EMEA South, AME North, AME South, APAC North, APAC South and covering more than 30 sales offices globally. Three different levels of the sales organization were selected in order to obtain a comprehensive and adequate cross-section of the different levels of the sales organization. An overall picture of the sales organization is very important to know the differences at the levels to have the most comprehensive and varied interview material possible.

Laine et al. (2007, 11-12) emphasizes maximizing learning opportunities in case study target choices. Case targets should be selected judiciously, and in such a way that researcher can learn as much as possible about the phenomenon. Efforts have been made to maximize learning by conducting interviews at different organizational levels and developing a vision of how different organizational levels see the same phenomenon. From each of the three levels of the sales organization, a group of six people was selected for semi-structured thematic interviews. The reason for the six people is due to the geographical reason, more specifically, the six regions through which the global sales network operates. To achieve the best learning opportunity, the study ended up

interviewing the Head of the Regions in six regions, the operative Sales Managers of six different sales offices, and Salespeople from six different sales offices.

Both regions and sales offices represent different sizes and cultures. This is important for the study because the global sales process and the newly implemented CRM system have been implemented in both large and small sales offices in exactly the same way. The interviews were conducted for each member of the group individually at a time convenient to them in order to ensure that the interviewee has the necessary time to participate in the interview.

The first set of interviews was conducted for all Head of The Regions in the six regions. The purpose of the interview was to gain an understanding of strategic management's view of the new CRM system and how strategic management perceives lower organizational levels' attitudes towards the newly implemented CRM system and related change. (see appendix 1)

The second set of interviews was conducted with operative-level Sales Management, which consisted of 6 individuals representing different sales offices from six regions. The purpose of the interviews was to gain an understanding of the attitudes of sales offices managers towards the new CRM system and their assumptions about the attitudes of salespeople towards the newly implemented system. (see appendix 1)

The third set of interviews was conducted with salespeople. Six individuals were selected to represent different sales offices from the six regions. Salespeople were interviewed with 3 CRM Champions in order to get the strongest possible view of the sales staff. The purpose of the interviews was to gain an overall understanding of the reaction of the salespeople and how the staff reacts to the newly implemented CRM system. (see appendix 1)

The interviews were conducted between 28 December 2020 and 15 January 2021. All interviews were conducted remotely using the MS Teams platform. The

average duration of one interview was about forty-five minutes. The structure of the thematic interview could change from one interview to another, but all aspects were reviewed in each interview, and, if necessary, clarifying and in-depth questions were asked. The interview sets were recorded so that the interviewer could fully focus on the course of the interview and ask any additional questions during the interview. The recorded interview was transcribed and served as a written note of the interviews. Hirsjärvi and Hurme (2004, 34-35) report that interviews are a way to get closer to the subjects and their thoughts and experiences. The aim of the interviews is therefore to find out how the interviewee thinks and what he or she has in mind. Interviews are for the purpose of gathering information and are not a mere discussion. There may be interaction in the interview, but the interview takes place on the initiative and under the guidance of the interviewer. In a thematic interview, all predetermined themes are reviewed, but their order and scope may vary from one interview to another.

### **3.2 Analysis of the data**

The analysis of the interviews was planned through themes when making the interview body and during the data collection phase in order to facilitate the spelling and analysis phases. The interview material was divided according to themes, and the topics that frequently appeared in the interview were counted. The interviews were analyzed with the help of thematic design so that the material could highlight the phenomena that illuminate the research problem. From the interviews divided into themes, matching topics were sought for the interviewees. The themes of the interview were built around the existing framework of the theme interview, and at the same time, additional themes were developed as needed. Interviewees were asked about their attitudes towards CRM system implementation; users support, project-related communication and project team.

At the end of the interview, the interviewee still had the opportunity to share more of their own opinions and comments. Separate comments were first analyzed as a separate group, but then efforts were made to incorporate them into existing

themes. In the analysis phase of the interviews, the themes of the interviews were used as much as possible. The exact interview questions can be found in Appendix 2. During the analysis phase, the observations of the typical anomalous material were considered interesting, and at the same time, the aim was to examine what features could be expected to be present in the material and whether they were missing. Such different phenomena or themes are very important for research, as they increase the depth and authenticity of the research (Hirsjärvi and Hurme 2004, 137).

In the choice of questions, the researcher's interaction with the sales organization proved to be important, but also the deep understanding of the theoretical part. In this study, care has been taken to ensure reproducibility with care and accurate documentation of the study so that the study can be performed again in the future. The interviews, spelling, and analysis of the study were conducted by the same person. The interviews were recorded and transcribed, and the analysis was done by listening to the interviews on several occasions as well as taking notes of the transcribed interviews. The aim was thus to present all possible options on the subject.

#### **4 RESEARCH RESULTS**

This section examines the findings at the sales organization level one at a time and then examines their differences as well as similarities. The findings are observed with excerpts from interviews conducted with people at different levels of the sales organization. The findings at the sales organization levels are topics that emerged remarkably frequently during the interviews and formed a clear consensus at the organization level. Separate comments were also selected from each level, which the analyst found relevant to present because of their anomaly or significance. These individual topics were even of considerable interest, as they took a strong view of how individuals themselves wanted the CRM system-related change to be handled. It is necessary to go through a general consensus,

but it is equally important to look at the individual differences of opinion in order to obtain in-depth and more precise information on the subject.

#### **4.1 Strategic management**

Head of the Regions had a few topics that stood out from the rest. Strategic management most significant interest was in the future of using the CRM system, promoting CRM change, and considering salespeople to the shift in the CRM system. Of the thoughts evoked by the interviews, these were the most recurring. The topics were referred to and returned to along with other issues as well.

The views of strategic management remained largely at the general level for the use of the CRM system, although on a few occasions, strategic management went to a very concrete level in its reflections on post-deployment issues. The strategic management saw that the implementation of the CRM system was generally successful compared to the project schedule. From a management perspective, the system is currently used by all “New Business” designed users. The clear consensus of strategic management was that the implementation of the CRM system divided sales offices into two camps. Certain sales offices implemented the system very effectively. However, globally, there are still sales offices with challenges related to the usage of the system. There are clearly fewer opponents than supporters, but they must be given their own attention. The following issues emerged from the interviews:

*“There are sales offices that gladly adopted the system; they see the opportunity and the fact that the more information is centralized in the same system, it also makes their job easier. Then there’s the opposite, too, i.e. people who are used to doing things a certain way, and if you’re bringing them something new, it’s often only seen as extra work. They don’t always understand that an old job should be removed if it could be removed.”*

In the view of strategic management, the long-term success depends above all on how the CRM system and its benefits are presented to the entire sales

network. It is also important to show how sales can reach a new level of efficiency through a CRM system. For users who have more challenges with the new CRM system, it would be good to better open the purpose of the system. Also, what is required of the system must be precisely defined and distributed to the sales network globally. Then it will also be easier to implement the change because everyone has the same target. Not just the management needs to know what the CRM system is all about and how the system will be used, but everyone in a sales organization should have the same information.

*“From a change management perspective, we should push when needed, but we also must be careful about a backfire.”*

*“Global targets such as what we want to achieve globally can help a lot. Based on that goal, we are able to find the right tune locally much easier.”*

Managing change through communication was seen as the most effective method. Strategic management saw threats in prejudices and misunderstandings, and as a result, communication quickly surpassed other means of change management. The strategic management saw that the communication related to the CRM system was generally organized at a good level. The clear consensus of the strategic management was that if there was more communication related to the system, there would be no harm to anyone. Everyone also thought that the communication through the Champions works well. However, managing change was not only limited to communication, but also saw different targets for promoting change, both in terms of additional training and project team involvement. The need for further training was seen in all six regions. However, the nature and content of additional training have changed somewhat depending on the region. Some managers felt that the general functionalities of a CRM system such as Opportunity Management are clear and over time, users will naturally evolve in other functions as well. A few regions, on the other hand, saw a clear need for core CRM related functionalities such as call reports and visit reports.

*“Communication may seem futile at times, but you have to remember that when a message might go past that, so little repetition doesn’t hurt. No matter what task anyone is in, I think it (communication) can be increased, then that’s when it gets better. You have to remember that communication is one of the tools of change management.”*

*“From my understanding, if we from time to time provide additional training based on users' mistakes on misunderstanding, it can help in general level. This kind of training is effective because you provide a solution to some particular issue.”*

*“I believe that we must do one step at one time (additional training to the CRM part), because if we do too many things at the same time, users will just drown and resist. It must be some default setup, for example, for Visit Reports with ready template and instruction/training for how to use.”*

Strategic management was of the opinion that the weaknesses of the system are currently in the processes that cause double work for sales. Also, some sales reps with weaker IT skills were clearly more sensitive to resisting the new CRM system. However, at a general level, these topics were the main ideas of change management. Strategic management has thus understood the need for change management and where it can help. Through the presentation of benefits, management's view of managing change through the usability of the CRM system is also highlighted.

**Strategic management differences of views.** The general ideas were clear to the strategic management, but in addition to these, there were also a few distinct ideas. It is good to bring these different ideas to the fore, as they bring different perspectives and opportunities for the implementation of a CRM system and for improving future development. It’s also good to look at these ideas because a broader unanimous opinion doesn’t always mean that everything was okay with the activities that were seen as important or that actions were being done right. Although the strategic management saw a generally positive development in the CRM system implementation processes, there were still ideas from its ranks for

improving the future. The CRM system was seen as unfinished for certain processes. The implementation and dissemination of the unfinished CRM system were seen as a weakness that desired improvement. The following issues emerged from the interviews:

*“We still need getting the guys to understand better what the core idea behind the CRM system is. Because what actually happened is that we deployed an additional part to the quotation system (STARS), and so it was not used as a CRM tool. The guys understand the quotation system really well. So, for the quotation part, nothing needs to be done. The task is to convert guys from this to a CRM system. We need a lot more training and guidance on the CRM system core functionalities. We need to focus and drive the CRM part and not the quotation side.”*

*“Clear issue at this stage is that the system is not 100 % integrated. We still need to do parallel reporting. We enter all the information into CRM, so basically all information can be found there, but we still need to do some excel files, so I see it as rework.”*

*“Also, one important issue is that part of our business is not in the system. I think we should have had sparse quotes from the beginning as well in the system because it is almost half of the business. Why we do not have it in the system?”*

Opportunities for improvement were also seen in strategic management's own processes. The Head of the Region, who had more contact with the salespeople, saw that plans should be able to be made earlier and faster. In his view, strategic management should have been deeper trained in the system from the beginning to make the dialogue with the sales organization smoother. The same person stated that they should have been clearly more in charge of the management process from day one. In his view, management needs to be able to tell everyone how the organization operates, and it needs to be strongly informed to all parties.

## 4.2 Operative management

In connection with operative management, two different topics were clearly stronger than others. The first was related to removing change resistance through better change management. This topic can be divided into removing resistance through communication and in-depth CRM training. Another major topic was the discussion between organizational levels, which looked at how different levels communicate their inventions about CRM-related changes and the successes and challenges associated with them.

Operative management also believes that the CRM system implementation at the general level was successful. However, even here, the interviewees noted that in almost all sales offices, salespeople are divided into two groups. Some individuals have had a positive attitude towards the CRM project and related developments from the beginning. Others were clearly willing to keep the status quo. From an operations management perspective, all salespeople currently use the new CRM system; however, the second group only to the extent required by the operative management. Resistance was seen as a threat by operative management, and to address it, resources needed to be set aside and certain change leadership practices needed to be put in places, such as continuous and clear communication about CRM-related change and its causes. Operative management believes that, in general, CRM-related communication can be improved further. Operative management was also aware that the smooth progress of change also requires good communication between organizational levels as well. The communication needs were directed primarily towards the salespeople through the Champions, as it was seen that communicating the change brought to them by CRM openly and avoiding ambiguity was most necessary of all. However, there were also differences in Champions communications to the sales network from the perspective of operative management.

*“CRM related changes could be communicated more often and more clearly. Sometimes they (changes) have only taken place, but they have not been*

*announced. Or if it has been announced, then it went past me and certainly also from the salespeople.”*

Operative management was concerned about the approval of the system by salespeople in the long run. Therefore, they think the purpose is to tell honestly and accurately about the change and its reasons always before the change. The sale contained more counterarguments to the very concerns that operative management saw the sellers had. Salespeople still do not understand the benefits of a CRM system for them. Therefore, the benefits that the change brought should be clearly stated through communication. Communicating the benefits of CRM change was seen as the best way to eliminate change resistance and increase interest in the CRM system in the long run.

*“I think it is important to highlight the benefits and tell the sales network what is being done with this goal, what is being pursued, why this is coming. It is necessary to justify these issues at the stage when the CRM system is introduced as well as during developments stages, as the salespeople will inevitably have to do more work.”*

*“Yes, this process has also caught up with me. Discussions, where information is shared, is an important aspect. CRM-related meetings with my own team could be held even on a weekly basis to review what has been done or what could be done better.”*

From an operations management perspective, communication needs to answer primarily the salespeople question of how this affects my particular job description. The operative management hoped that they would also be fully informed about the future change. For operative management, communication was not to remove their resistance, but because they are able to prepare for the practical arrangements for change at their own organizational level and in the direction of salespeople. Most thought that communication should become more than it is now.

*“Communication should be organized that openly explain what is being done, why has been done and what benefits are available? That is, where the system bends. And also, at what stage we are at now? It is important to remember to present to the individual user the benefits he/she can achieve through the system. Is it of any use related to an individual seller?”*

*“Showing the direction of the future is an important means of communication at this stage. Industry BU sales have never followed where all offers lead. They became either negotiations or orders, but they have never been asked for. There has been so much to do that there was no need for one.”*

Removing resistance from the organization as a whole was a major topic for operative management. The second-largest issue within the elimination of resistance was the reduction of resistance through additional CRM training. Training is part of the basic functions of an organization and takes place all the time. According to the operative management, the general training related to the CRM system was also well organized. However, part of the operative management saw that thorough training on all changes is worthwhile, also provided at intervals. Instructions sent by email do not always provide the best results. The need for continuous and light CRM-related training was seen as necessary, while too heavy and intensive training was seen as a risk for resistance.

The discussion between organizational levels and the use of the entire value chain in CRM system project changes sparked much discussion in operative management. Management agreed that all levels of the sales organization should be involved in the CRM implementation project. Operative management saw that the project team planning this change must have strong representation at all levels of the sales organization. Operative management did not have a bigger idea of how much different organizational levels are being used in change processes, but they don't think it's visible enough at the moment.

*“Definitely strategic management should attend joint sales meetings with Salesforce as the agenda. For example, Head of Sales should be present at these events to explain where and how he will use the new CRM system.”*

Operative management saw that salespeople should be asked for comments on the stages of change, and this should be done, even by small groups who get to think things through concretely and then bring their ideas forward. Operative management believes that staff could be provided with a forum or column where they can bring ideas and suggestions for improvement.

**Operative management differences of views.** Overall, operative management had a clear consensus around many themes and issues. However, a few disagreements have come to light during the interviews. When a member of operative management was asked what kind of resistance to change has occurred in his sales office, the answer was clearly different. The Sales Office Manager said that the biggest resistance to change had been related to the sharing of information in the CRM system related to contacts. In that sales office, sellers perceive a clear risk of sharing their own industrial sales contacts because they feared that sellers in another division in the same country might use them for their own interests. Their concern was that salespeople from other divisions might therefore be able to take advantage of those contacts in their own business, even if that was not correct under the group’s rules. This means that the operative management in that country will be left with the bigger effort to change the CRM system to manage the practical tasks under slightly more difficult conditions.

Another member of operative management did not see the need to participate in the discussion process related to CRM changes. From his point of view, the interaction process organized through the Champions works very well and covers all the needs of the sales office quite well. According to the sales office manager, there is no resistance in his sales office, which in turn explains that approach. Most of the salespeople in that office are relatively young and have good IT skills.

*"I do not have any problem with change, especially when the question is related to corporate change. I understand that this question is related to salespeople habits, but we just need to apply it. It is not terrible at all. Of course, it is a big change, but still, from my perspective, it is not impossible for my team or me."*

When a member of the operative management was asked how the Project team receives criticism, the answer was also different. A member of operative management said that as long as all changes related to the CRM project are approved and implemented without comments, then all is well. However, if the sales office asks questions and asks to justify the need for change, then the project team does not always bother to respond to the request. The answer may be, *"that it has been so decided."* If based on the response, the sales office still demanded justification, the Project team treats it like resistance to change. This operative manager believes that the Project team should be more open to engaging in a common dialogue related to change.

### **4.3 Salespeople**

The salespeople raised two main issues. The first topic was improving the flow of change. The improvement could be shared through information and communication on CRM system change as well as additional training. Another topic was the functionality of the CRM system and its benefits from the salespeople perspective.

At a general level, salespeople also thought that the implementation of the new CRM system went well. Which sellers found the deployment went even surprisingly well compared to the sales organization previous IT projects. During the interviews, the implementation of CRM was often compared to the implementation of the STRAS CPQ tool, which did not go as well as desired. However, there were also technical challenges in the implementation of the CRM system as early as the first week, but they were quickly rectified. During the interviews, the salespeople spoke several times about the current minor technical issues that were hoped to be resolved soon. The new system and the technology

that came with it were considered good for several reasons. Salespeople raised topics such as the transparency of the bidding process, flexibility, integration with the CPQ tool (STARS), and the fact that global Tendering Support Teams were under the same system.

*“Especially now during COVID time when people work from home and have conversations related to tenders, so important part of the conversation can happen in the CRM system. So, If someone out sick, somebody can step right in and fill in the blanks, and you never miss a beat.”*

Salespeople saw that their younger and with better IT skills colleagues adopted the CRM system and the idea behind it much faster than their older colleagues. At the same time, salespeople reported a correlation between the STARS CPQ tool and the CRM system. Sellers with good STARS CPQ tool skills accessed the CRM system significantly faster than those individuals who had not used the STARS CPQ tool so much earlier.

Salespeople additional training was seen as one of the most important topics in CRM system implementation. The importance of training consisted above all of the sellers' understanding of what the new system aims to achieve. The training was seen as a factor that promotes change and facilitates everyday activities. Salespeople were interested in the ways in which a CRM system can help them with their day-to-day operations. The biggest concern of the salespeople was that the system is currently only served by top management. Some sellers felt that the new CRM system was implemented primarily in a reporting sense for top management, where sellers are used as a reporting tool. For this reason, salespeople create additional work, which they often called double work or rework.

Salespeople felt it was partly unclear where and how certain features of the system should be used. As an example, sellers used bid documentation or use Chatter. Salespeople would like to have clear instructions such as when to use Chatter and at what point to use Outlook. At the same time, several sellers

considered which workflows should be transferred to Salesforce and which should be maintained as before.

*“Why can’t we have a user manual related to all main functionalities?”*

*“It’s a double work and some of the salespeople think that it’s somebody else’s job to update those Opportunities.”*

*“They can’t see benefits for them, so they can’t even just relax enough to see if this system will do something for them.”*

Admittedly, salespeople noticed a positive change in the way they organize and invest in training compared to other IT tools. On the other hand, sellers felt that the importance of the issue could be further emphasized. The sellers also quickly took concrete measures with regard to additional training. Sufficient time and resources were requested for the training to be able to properly focus on the topic through concrete examples. Salesforce CRM self-learning environment Trailhead was not considered the best way to learn the system. However, the need for training has not been exactly the same, as salespeople’s IT skills vary a lot from one sales office to another. Through the interviews, it was stated that more attention needs to be paid to the training events. Opportunities to introduce new features, preferably through hands-on experience, were desirable. It was hoped that the event would be held at the country level or at the highest regional level.

*“Regarding to Trailhead, none of them are interested in going out on their own. They want training to come from our group sessions where people bring up live issues. So, they seem to understand better with an actual example versus just some kind of book example.”*

*Even once a month or once a quarter, it would be good to hold a joint event, broken down by region. It would be good if they had the same people working in the same environment. The agenda can be a pre-agreed topic or without an agenda.”*

Communication through the Champions had been raised as a common and good way of communicating project details. However, CRM-related communication from a salespeople perspective should be primarily operative management communication to its own team. Communication and outreach were seen as ways in which the superior of one's own sales offices create a clear plan for staff for change. Salespeople saw that with the new CRM system, there should be business-level communication. When the communication takes place through a sales organization, and not just through the Champions, everyone receives the same message without risk, and on the way, the message does not change or is forgotten. The sellers also gave a strong opinion on what is expected of the communication.

*“Sales office managers should be more involved in outreach. If there is a change in the use of the system, then those superiors would be able to tell the matter further. Because normally all the instructions on how one should behave, and act come through them”.*

*“The same Champion can be a support person for multiple sales offices, and each sales office has its own way of operating authoritatively. Somewhere in the sales office, it is perfectly OK for Champion to tell about the change, but somewhere else, the superiors want to know how his team is doing before Champions.”*

During the CRM system implementation project, justifying the change in communication was also seen as important. There had to be a clear reason for the change and then a plan on how to take the change forward. Timely communication of change was also seen as important. There was a desire for information neither too early nor too late.

*“It's not good if the team doesn't have enough time to react or have the necessary discussion before the change.”*

**Salespeople differences of views.** Slightly different views emerged when looking at CRM deployment in general. One member of the sales office believed the implementation did not go as well as hoped. According to individuals, the biggest challenge would be in those persons who were elected to the role of Champions. When it was time to use the system, the sales team wasn't ready for it, and the Champions did nothing to improve the situation. A representative of that sales office stressed that the problem was entirely local and that from its point of view, the Global CRM Project team was doing all its responsibilities on a global level.

One salesperson from another sales office raised the same theme as the operative management of the same sales office. His concern had been to add and share contacts in the CRM system. The same topic is described in part "Operative management differences of views".

#### **4.4 Attitudes between levels of the sales organization**

The sales organization had the same views very much, and the levels of the sales organization dealt with very much the same issues. The clear consensus of the sales organization was that the implementation of the CRM system went well. It is very important to note that each level of the sales organization emphasized that the implementation of the CRM system as a very successful project compared to the schedule, resources, and previous IT projects. In managing change, each level of sales organization attached importance through communication, training, and participation in management support. These issues were seen as necessary parts for the future of the CRM system project. The technical side of the system and its development had also been raised several times. Each level of the sales organization considered these topics very necessary for the smooth progress of the change process. Management and salespeople were also able to see the same things from each other's perspectives; however, management was clearly more interested in salespeople perspectives. Management's interest in salespeople's perspectives is

understandable, as it allows for a better understanding and management of the sales organization.

All levels of the sales organization were interested in developing the system in a better direction. Developing the system in relation to the needs of the sales organization is a unifying factor, and it was not surprising that everyone paid attention to how the system can serve all parties and how the service can be further improved. Managing change and removing resistance to change was a common denominator at all levels of the sales organization. The sales organization believes that change management tools such as communication and training should aim to reduce misunderstandings related to the CRM system. From a change management perspective, it was said that everyone wanted better and more comprehensive system related knowledge and communication.

There was no ideological confrontation between the levels of the sales organization, but the differences in views were more dependent on the emphasis of things. Clearly, strategic management emphasized more that the system is still unfinished for certain processes. Strategic management believes that reporting with two systems will provide them with extra work. In this sense, the implementation of change can be considered unfinished. From the point of view of the use of the sales organization's resources, the continuous input and maintenance of data in two different locations are not very efficient. The strategic management also wanted integration of the spare parts and service business into the CRM system. Operative management, on the other hand, emphasized more importance to others in the cross-organizational discussion. Operative management believes that participating in the dialogue helps all parties, including the project team. Sellers, on the other hand, would like others to receive more customized training and knowledge. In their view, it helps to understand the system and its benefits for the individuals, which in turn helps to reduce resistance to change in the long run.

At all levels of the sales organization, exactly the same topics emerged, but different levels of the organization considered only some things more important

than others. However, this did not mean that other aspects were not considered necessary or important. In conclusion, the divergent views were not very radical. The biggest differences between the organizational levels were due to differences in emphasis around the same topics.

The following tables summarize the main findings from the empirical research for the entire sales organization. The table shows the consensus and individual opinions formed at the sales organization level that was considered relevant to the study.

Table 1. Main findings of the empirical study

Sales organization level	The main findings
Strategic Management	<ol style="list-style-type: none"> <li>1 Promoting change through communication</li> <li>2 Promoting change through education</li> <li>3 Promoting change through project team involvement</li> <li>4 Promoting change through technical development of the system</li> </ol>
Operative Management	<ol style="list-style-type: none"> <li>5 Promoting change by communication between organizational levels</li> <li>6 Eliminating change resistance through clear and open communication</li> <li>7 Eliminate change resistance by highlighting the benefits of CRM</li> <li>8 Promoting change through additional training</li> <li>9 Project team involvement in change-related dialogue</li> </ol>
Salespeople	<ol style="list-style-type: none"> <li>10 Promoting change through additional training</li> <li>11 Promoting change by highlighting the benefits of CRM</li> <li>12 Promoting change through communication</li> <li>13 Promoting change by justifying reasons for change</li> </ol>

	14 Improvement functionality of the CRM system in connection with other systems
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## 5 ANALYSIS OF RESULTS

This section looks at how findings and theory meet and how existing knowledge can be used to answer research questions. Based on the interviews, an attempt was made to identify and describe the main factors influencing the implementation of the change in the global CRM system project. The aim is to find and analyze a variety of pragmatic ways and solutions that an organization could utilize in an ongoing project.

The next step is to review the progress of the change related to CRM system implementation and the key factors associated with it by comparing them with the literature. In the Industry Business Unit sales organization, change processes are implemented depending on the change types. The introduction of new guidelines or a new tool are short-term, episodic changes that do not necessarily require specific action according to any particular pattern of change, so they are planned and implemented as needed. Larger projects and tasks such as the introduction and implementation of a CRM system, require clearly more anticipation, planning and preparation. Therefore, for this empirical part Kotter's eight-step change management model is used as an analytical tool for describing and analyzing the coherence of change.

**Step1.** According to Kotter (2007, 4; 2004, 49) there must be a clear and justified reason for any major change. The organization should create a "sense of urgency" to make a smooth change possible. In other words, the organization must create a sense of urgency, the compulsion, the necessity of change. Another important addition is that the focus in the first stage should be on people's emotions and not on a rational approach.

From an analytical point of view, the first step is a bit challenging to assess completely objectively, as almost all the measures related to the first step were planned by the Sulzer concern, and the Project team of the Industry BU had no major influence at this stage. However, on a division level, CRM project was clearly a strategic decision with very strong support from the Group's senior management through the division president and CEO. The goal of the Group's decision clearly extended far into the future. The Group's action, which mainly involves communication, had a very positive effect on the project. It affected the management of the business units, as well as their attitude towards the future project and the related change. Already at this stage, all levels of the sales organization understood that future change is an important strategic project. At the same time, it laid a solid foundation for Industry BU's Project team to plan the course of the project and related measures.

Analyzing the initial communication related to the CRM implementation of the business unit, it can be stated that the communication was sensible and through it the change process and related functions were initiated. However, the content of the communication was more rational, and no attempt was made to influence people's emotions as much as recommended in the literature (Kotter 2004, 49). At this stage, the practical activities differ from the literature. It is conceivable that it is precisely because the implementation of a CRM system in some sales offices did not go as well as hoped. When it was time to use the system, the entire sales office team wasn't ready for it, and the Champions did nothing to improve the situation. The collective sense of urgency that would have forced people to inspect the problem was left unaddressed. Although the interviewee said that the problem was due to the people who were chosen as Champions, it can still be seen as only part of the truth. The entire sales office, including the Champions, have received the same information through communications related to CRM rollout. As a result, there should have been a clear understanding at the team level that change is important to the sales office and that the team should seek immediate action. However, this did not happen. Such a weak attitude to change and its importance could possibly have been avoided through emotional communication with people right at the beginning of the project.

**Step 2.** According to Kotter (2004, 53), in the second step, a guiding coalition of reformers should be formed, which should include members of the organization with extensive networks, authority, and the ability to influence things.

Here, the sales organization procedure is fully in line with the literature. The core team of reformers related to CRM implementation has included the project team, and the Champions appointed for CRM implementation. The central role of the champions was to be the link between the project team and the users.

Champions also had important roles throughout the change, the most important of which are:

- Develop advanced skills and knowledge of the Salesforce Platform
- Deep understanding of Business Processes and organizational structures.
- User Training
- Promoting the proper use of Salesforce platform and related Change Management.
- Providing Functional Support (i.e. first responder) for all Salesforce User Support Inquiries.
- Participation and collaboration in regular scheduled meetings of the Champion's Community.
- Primary Interface with Salesforce Administrator and Administration Team

The composition of the Champions was very heterogeneous and formed a cross-section of the business unit's sales organization. The Champions included individuals with very different roles such as Sales Engineer, Account Manager, Area Sales Manager, Sales Support Manager, Project Manager, Tendering Manager, Head of The Region and others. Throughout the project, the Project Team and the Champions worked closely together and have supported each other on a wide range of issues related to the implementation of the change. Through the findings, a clear consensus had formed at all levels of the sales organization that Champions played a very important role in bringing about change. All three levels of the sales organization were pleased with the change

process that had been organized based on Champions support. All three levels of the sales organization have emphasized the important role of Champions in training, communication, and ongoing interaction with sales offices. Also, according to Oksanen (2010, 108), every well-functioning and actively used system is backed by brilliant core users. The enthusiasm, commitment and brisk spirit of the core users are practically always reflected in an excellently utilized system.

Both operational management and salespeople stressed that strategic management should have been more in the Champions role. The operational management hoped that the strategic management, as well as the Head of Sales, would participate in the joint CRM meetings, where the management would have shown through their own example what they think is important and how they utilize the system in their daily work. In other words, both salespeople and operational management considered it important that strategic management is more involved in CRM-related activities and communications and become more transparent. Representatives of strategic management were also of the opinion that they should have been more involved in change management and its planning from the very beginning.

Earlier theories emphasize that what a leader value shows people what is important. According to Oksanen (2010, 50-51), the involvement of senior management in change is very important when it comes to methods of change leadership. In addition to communicating the big picture, leaders need to be able to explain to each employee during the project what the project and the change associated with it means to him or her. Commitment is not created by management but requires an understanding of the change in one's own work environment that extends to the personal level. Just talking about commitment is not enough; the leader must also commit himself. In the context of CRM, the commitment of the manager means the genuine adoption of new ways of working and the commitment to exploit the solution. Promoting change as well as removing resistance is the responsibility of management, as they are usually meant to influence other levels of the organization and not the other way around.

**Step 3.** According to Kotter (2005, 5-6), the creation of a vision and strategy clearly indicates what the change is intended to achieve and with what kind of strategy. For a change project to be successful, a vision and strategy must be developed. The vision makes the direction of change clearer, encourages the right actions to be taken, even if they are cumbersome, and coordinates a large number of people to take action effectively. Oksanen (2010 103-104) has quite a similar idea as in a CRM project, leadership related to vision and strategy is needed as much as looking after day-to-day issues. Management needs to understand the change in users' daily work and demonstrate that the change affects everyone in the organization, including management.

The theory supports pretty well the research findings also in this part. The vision and the strategy built around it for CRM implementation have served as the basis for implementing change. The implementation of the vision has mainly been carried out through the Champions. Therefore, it was extremely important to make sure that all Champions understand what the vision is about. Based on the study, it can be said that all three levels of the sales organization have embraced the change and its direction at the general level very well. Empirical results show that all three levels of sales organization have a clear understanding of change. Proposals for the development of the system and related components also showed that the sales organization has a clear will to change. Already at this stage, all levels of the sales organization considered the future in the context of CRM through very concrete proposals. Some proposals were the same at all organizational levels, but some were very specifically tied to the organizational level. The proactive approach is visible as development proposals that stretched from the present to the far future. That trend should be maintained through constant interaction through the right channels.

**Step 4.** According to Kotter (2004, 107), communication should create good conditions for change and the implementation of vision and strategy. The change must be communicated adequately and in several forums.

From examining the research results, it can be said that communication was clearly one of this study's biggest topics and interests. The entire sales organization had one parallel view of change management, which all three levels of the sales organization felt were of considerable importance. Communication within the sales organization, involving information and justification for change, was the most important change management aspect among all levels of the sales organization. Communication was thus perceived as extremely important, even a primary part of change management and its success. All levels of the sales organization emphasized its importance during the time of change. Also, here the literature and previous theories support the well-obtained research results.

The clear consensus of the sales organization was that the communication related to the CRM system implementation at the general level was well organized. The strategic management, as well as the salespeople, were pleased with the communication organized through the Champions, and they felt the process served all parties quite well. The strategic management stressed that if communication is increased, there would be no harm to anyone. Strategic management saw that promoting change for the best of all happens through communication. The operative management also believes that removing resistance should also be done through continuous and clear communication. Operative management stressed that CRM-related communication could be further improved. Operative management also stressed that the smooth progress of change also requires good communication between organizational levels as well.

Operative management saw that all organizations should participate in the discussion together, as everyone has their own vision of how the system can and should be used. It was hoped that the CRM solutions made and to come, as well as the benefits of the system, would be discussed openly in a common forum. Salespeople stressed that for them, communication is first and foremost a clear plan for change. It was also logical that salespeople thought communication should be primarily operational management communication to their own team. Similarly, the sellers highlighted the main justification for the change. There had

to be a clear reason for the change and then a plan on how to take the change forward. Timely communication of change was also seen as paramount.

Based on the results, it can be said that it would be worthwhile to invest in more effective communication, because everyone wanted smooth communication, and everyone understood its importance. Improving communication requires more than just the project team's own activities. Communicating change properly is the responsibility of the project team, but improving communication, a change in attitude throughout the sales organization is needed. It would therefore be important to improve the importance of communication at the level of everyday activities. The project team will certainly be able to create more communication between the levels of the organization, after which it would become a normal way to take the project forward. Communication can be seen as an absolute development target for the sales organization, as it can certainly be used to enhance the sales organization's subsequent actions as well. So good communication should not be limited to individual cases but should be the way an organization does things. Previous theories aim at comprehensive communication in all possible forums. According to Kotter (2004, 108), communication should be a daily routine for those involved in the change process. Piha (2000, 222) expands Kotter's vision and calls communication as a main force for change. According to her, the bigger the organization, the more systematically it must require maintaining a constant interaction.

**Step 5.** According to Kotter (2004, 129), barriers to the vision must be removed so that members of the organization can begin to implement it. Barriers can include old structures, systems, and opposing employees as well as management. Barriers can be small or very large. The core set should protect the vision in every possible way. Based on the research results, it can be said that the literature supports research results.

Through the interviews, no significant barriers had been identified in any region or at the level of the sales organization. It is conceivable that the support of the Group's senior management, as well as the large and heterogeneous core team

of Industry BU Champions and their actions, are larger factors that have resulted in no significant obstacles during the implementation of the change. The support and commitment to change of strategic management and operational management can also be considered positive for the implementation of factor change. Resistance to change in the form in which it has occurred during the change process of a CRM system project should not be considered as a significant barrier in this case. As previously stated in the literature, resistance to change is a normal reaction in an organization and is part of the implementation of change (Lämsä and Päivike, 2013, 190). People are prejudiced about change because it changes the current state of equilibrium and because of this, they are not immediately excited to be involved in making the change. If people are not ready for change or are not psychologically prepared for change, they are more likely to experience more resistance to change.

Empirical results show a consensus at the sales organization level that the implementation of a CRM system at a general level so far has gone well without major challenges. In this sense, the measures that eliminate resistance to change in the project team and promote change so far can also be considered successful.

**Step 6.** According to Kotter (2004, 155), even the slightest visible success encourages people to move forward. They see that their work has paid off, and that is clearly related to the change being made. It is therefore very important to set milestones to make it possible to celebrate short term wins. The main tasks of the winners are to build trust, get intermediate feedback, maintain the right pace of change, and eliminate resistance to change.

Based on the research results, the literature supports study results here as well. When reviewing the progress of a CRM change project at this stage, emphasis should be placed on the Group's and Businesses Unite actions. About six months after the implementation of the CRM system, the Group's top management has emphasized in its communications the successful implementation of the CRM project in several business units, of which Industry BU was also mentioned.

Similarly, at a communications event covering Industry BU's entire business unit, the Head of Unit raised the CRM project and related successes in his own presentation. The presentation covers results that have been achieved with respect to the CRM project. The same presentation also main objectives for the future related to CRM development. It can be seen that this type of support from both the Group and the senior management of the business unit has a very positive effect on the change in implementation.

Without such support and milestones, the process of change can face major challenges. People involved in change may think that the process of change has either slowed down or stopped completely (Kotter 2007, 7-8). Achieving these types of milestones shows all users of the system, Champions, and the Project team that they are doing the right things and that there is still work to be done. Setting goals for the future will help projects move forward at the right speed in the right direction. The situation should be reviewed periodically to make the approach to the change process more analytical. According to Ciborra (2000, 114), very often, a CRM-related project is more of a journey than a destination. While the project has beginning and endpoints, one should remember the challenge of implementing CRM. Only a determined and clearly managed approach can ensure success in the long run.

**Step 7.** According to Kotter (2004, 177), at this step of the change process, work must be done even harder for change. When the project team has the pace to make a difference, activities should stick to it. Changes depend on each other, and after one success, it is easier to start implementing the next. The biggest mistake at this point would be to declare victory too early.

At this stage of the research, the Industry BU sales organization's CRM implementation is in a state where all New Business Sales target users are using the system based on the original plan. They have adopted the goals set in the original training and are following the instructions given by the management. The examination of the research results showed that both sales offices and users are divided into more proactive than others.

Resistance to change occurs very little in the sales offices, but it still needs to be given its own attention. As stated earlier, resistance hampers the operation of the entire sales organization, and growing resistance to change, above all, slows down the common goals of the project team and the sales organization.

Underlying factors in resistance to change are fear of something new, uncertainty, attitudes to change, and ingrained ways of doing things in a certain way (Piha 2017, 163.) The average age of users of the new CRM system and general IT skills may have contributed to the occurrence of low utilization as well as resistance to change. The project team should focus more on this group before major system-related changes are implemented globally.

The project team should also focus on the technical part of the system and its development. The research results show that the system is currently incomplete in terms of reporting. Strategic management stressed that reporting with the two systems will provide them with extra work. In this sense, the implementation of change can be considered unfinished. According to Oksanen (2010, 291), the continuous input and maintenance of data in two different locations are not very efficient in terms of using the sales organization's resources. CRM is best rooted in an organization when it is a natural part of business activities across the board. Customer visits, calls, and contracts management should be a key part of operative sales management activities. Monitoring and measuring these activities should be an integral part of the CRM system.

At this stage, the project team has already set goals and direction for the development of the system for the future. This supports Kotter's (2004, 177) idea that the important thing at this point is not to stop but to move forward. While future goals are known, the project team should carefully consider the next steps. It is very important to keep the Champions as well as all levels of the sales organization aware of the future direction and goals. The levels of the Industry BU sales organization should still be kept in mind as separate parts, as their needs are not homogeneous.

By examining three levels of a sales organization and their perspectives, it is concluded that each level is clearly focused on the area that concerns them most in their daily work. The individuals of an organization mostly remain in those areas of change in which they are more interested, and which affect them. This is very understandable, as each level knows best the measures related to their own activities. From a sales organization's point of view, this also makes sense so that different levels do not start devoting their own limited resources to measures or reflections that are not directly related to their own core competencies. Therefore, the next steps in the change process should be carefully prioritized, taking into account the separate needs of the levels of the sales organization.

**Step 8.** According to Kotter (2004, 200), the last step, it is essential to stick to new ways of doing things so that they displace the old ones. Cultural change is slow and takes time. Habits and attitudes are always difficult or even extremely difficult to change, and it is important that there is a lot of talk about new ways so that they are rooted in the organizational culture.

Research results showed that the first phase of the implementation of Industry BU's CRM system, in general, has progressed successfully. The objectives set for the first phase have been achieved based on the initial schedule, budget, and qualitative aspects. According to Oksanen (2010, 290), at the individual level, the change related to CRM implementation is reflected in new ways of working. The rooting, therefore, starts through repetitions. Only when the users recognize the benefits of CRM tools for their own work can be truly stated anchoring the approach. The utility aspect is essentially user-dependent. When the system genuinely serves users, they probably don't want to give up the tool. At the organizational level, change is reflected in things that individuals do collectively.

At this point, the sales organization has already set new expectations for future development, which is a positive factor for the project team. However, it should be borne in mind that the collective standards of conduct associated with a CRM system emerge during certain periods of operation over a relatively long period of time. As long as the results of the change were not officially rooted in the social

norms and values of the sales organization, the Project team should persevere in driving the change forward. At this stage of the implementation, there should be a clear message to all levels of the sales organization as well as to Champions of shared success. The project team should clearly show that every Champion, Strategic Manager, Operative Manager, and sales individual is the cause of success.

Oksanen (2010, 29) measures the implementation of a CRM system as successful only after two years and if each of the following criteria is met: (1) At least 4/5 of the planned users use the system regularly. (2) The sales organization is dependent on the system, i.e. the system provides the information needed to run the business. (3) The system is an integral part of the organization's information management. That framework can also be considered fully relevant in this implementation project.

## **6 CONCLUSION**

It is clear from the literature that failure of CRM implementations is very common. The reasons for failure can be numerous. However, the background and responsibilities of failure often remain obscure. CRM implementations are unique in themselves, as they combine both the connected changes in business processes and the introduction of the new tool. The implementation of a CRM system fundamentally is a change project; therefore, it should be treated in a relevant way.

### **6.1 Main results**

The aim of the study was to empirically investigate which issues should be taken into account in the implementation of the ongoing change in connection with the international CRM system project. The main question of this study was: "What key change management factors a sales organization should consider in the context of an international CRM project?" So, the purpose of the study was to

map and make visible the issues identified as challenging in relation to the change. In addition, in order to be able to examine the main study problem in more depth, two clarifying questions have been added to the study: (1) “What factors contribute to actual rooting of the system in sales organization?” and (2) “How can resistance to change be affected?” The results of the study are used to achieve a better degree of implementation of the CRM system in the sales organization of the Industry Business Unit.

The study was conducted as a qualitative case study by interviewing members of the target company’s sales organization from six regions using a semi-structured interview method. The study focused on three levels of the sales organization, which are strategic sales management, operational management, and salespeople. A comprehensive and adequate cross-section of the sales organization was sought through three different levels. A total of eighteen people participated in the interviews. After the interviews, the material was analyzed, and the answers were structured by thematic area. As a result, the main findings of the empirical study were formed in the form of a table with three levels of the sales organization. Then the research findings were analyzed and looked at how the findings and theory meet and how existing knowledge can be used to answer the research questions. The CRM system change process and related key factors were analyzed using Kotter’s eight-step change process model.

Through the theories, it was found that the successful change of a CRM project requires the full commitment of the members of the organization, openness to change, sufficient pressure on the project, and a positive attitude. An extensive process of change is never simple and easy to manage and implement. When the background, reasons, and goals for change are clear and have been brought to the sales organization in an understandable way, it is easier for individuals to commit to the change. Through theories, it was seen that change has high risks of failure, and change involves many different components. The theory also provided models and frameworks for how change management can improve the progress of change and how organizational staff respond to change.

Empirical research has shown that, for the most part, previous models and theories were completely valid and can be used to create guidelines for major change also in the CRM context. In this case, however, the view on the ongoing change in attitudes at the level of sales organizations and its important parts from their perspective was clarified. The results obtained through the study highlight the points to which the project team should pay more attention during the ongoing change of the CRM system.

Communication was raised in theory and very clearly in the empirical part, and therefore the importance of communication as a result of the study is significant. It is clear from the results that communication would be an important force for change in promoting it. Also, in the context of a CRM system project, communication is clearly one of the most effective change management tools. The results show that reducing resistance may also be best achieved through communication activities. Empirical results indicate that communication would not be a one-time event but an ongoing process involving all levels of the sales organization. Changes to a CRM system project should be explained very precisely what changes, why changes and, above all, what it entails for the sales organization level. This creates a positive and reliable attitude to change through the sales organization.

Research results show that in promoting change, in addition to communication, it is important to provide users with additional tailored training. The most important tasks of a CRM system and the training related to its features is to remove the tension and misunderstanding associated with the new system and the related change. Champions must have the latest knowledge and understanding of the changes and features associated with a CRM system. The role of the champions is to pass on the latest information to their own users. Champions should strive to systematically analyze the critical users in their sales offices and assist them in all matters related to the CRM system. Training sessions should take into account groups of different levels and with different dynamics and aim to be tailored to the needs of the training group. By understanding the CRM system, users will be able to see the benefits of the system better. Understanding the

benefits improves acceptance of the system, which in turn contributes to promoting change and may reduce resistance.

According to empirical research, in addition to communication and training, the technical side of the CRM system also required further development. Success in implementing change required the system to be fully integrated with the sales organization's business processes. An approach that supports loose data management cannot make sense for the use of an organization's resources. Continuous input and maintenance of data in several different locations are not efficient and contrary to the CRM strategy. The technical solutions and implementations of the CRM system should fully support the needs of the sales organization. System features should not conflict with business processes. A CRM system should support and facilitate users' daily activities in both an operational and analytical sense. The additional work that causes a CRM system for technical reasons should be eliminated through better design and process harmonization for sales organisation levels.

## **6.2 Practical recommendations for research commissioner**

There are several factors in the change process that should be kept in mind as change progresses. Combining theory and empirical part provides a number of key change management factors that Industry Business Unit sales organization should consider in the context of an ongoing international CRM project.

### **6.2.1 Communication**

The Project team with sales organizations must be the information owner and manager at all times and have ready answers to all questions raised about the CRM system and related change. Communication needs to take place with the strong three levels of the sales organization in mind. Communication must be a matter of fact and honest and clearly state the reasons and benefits associated with the change. With each changing phase, the Project team should tell very precisely what is changing, why it is changing and, above all, what it means for

the sales organization levels individuals. This will create a positive and reliable attitude to change through the sales organization. However, salespeople do not have to be burdened with all the information provided to management, but opportunities should be provided to keep the change open. It must also be borne in mind that large-scale changes should be communicated in sufficient time to allow time for all levels of the organization to respond and prepare.

Communication should be continuous and evenly distributed over time so that new changes do not come as a surprise to anyone. The slackening of communication can cause problems, and therefore, communication needs to be taken seriously throughout the change project.

Both strategic management and operative management want to communicate related to change as early as possible, as the effectiveness of change management is based on effective communication between levels of the sales organization. The operative management believes that it would be best to have joint events where the changes could be discussed with the Champions as they represent salespeople. On the other hand, salespeople would like the discussion events to be held either at the team level or at the highest regional level. Improving communication on a practical level brings reliability to change.

Continuity of communication should be tied to pre-booked joint meetings, for example, once a quarter. Meetings should include the Operative Managers and the Champions of the sales offices in that region. A similar meeting should be held with each region separately. The agenda for the meeting may be planned in advance through which the reasons for the change are justified; however, sufficient time should be set aside for free discussion. Two levels of the sales organization should be given the opportunity to provide feedback on what has already been done, as well as the opportunity to suggest necessary questions and suggestions for improvement. The Project team should hold separate workshops for the Head of the Regions that focus on change aspects and a deeper system of education.

The project team should gather all the important things that will be discussed during the meeting. Particular attention must be paid to feedback. Feedback should be responded to as quickly as possible. It was noticeable from the interviews that the members of the sales organization feel more valued and feel that the message has arrived when the feedback is given. Feedback should therefore be taken seriously, and the organization should take a new way of responding quickly to the feedback.

The project team should also not forget practical issues in their own communication. The sales organization should know very clearly where to find the necessary instructions, what the new functionalities mean in practice and where to get help when needed. Communication of post-deployment success stories is also very important. When the change can show benefits other than a mere technical change to the system, it will be easier for users to tolerate the downsides of deployment.

### **6.2.2 Additional training**

One of the most important tasks of additional training is to dispel the tension and uncertainty associated with change. In this case, communication and training are the most important aspects of change management. However, training has its own operational role. The main task of the training is to get all the planned users to use the new CRM system completely independently.

Until now, the training was mainly organized as online training due to the Covid19 pandemic. Each Champion has received a broader familiarity with the CRM system and its features, first from Salesforce's own training platform called Trailhead. Since then, Global CRM Lead has trained Champions in the technical aspects of the CRM system in a few teams. Champions were assigned one or more sales offices whose users they were to train. Based on the research results, users are mainly satisfied with that operational process. As a result, the operational process related to training should not change. However, the description of Champions responsibilities should be modified by expanding them.

The project team should make sure that all Champions are aware of all the latest changes, as well as that they genuinely understand them. This should be ensured, for example, at joint meetings held once a quarter. The project team should also periodically ensure that the Champions pass on the messages to the sales offices to the extent required of them. The project team should update and maintain CRM system support materials that Champions and other users can use in their daily work. Support materials should include answers to important themes in an easy-to-understand way.

Champions should strive to systematically analyze the so-called critical users in their sales offices. Critical users are those who, for some reason, have challenges related to the use of CRM, as well as users whose general IT skills are below average. Champions should pay attention to errors in the system and, if necessary, assist individuals in correcting them. These individuals can be relatively easily identified from the system by monitoring monthly quality reports. Also, from time to time, it would be good for Champions to hold meetings with their own group, where they should be aware of the challenges in the team that can be solved by training.

In the training session, exercises and their repetitions must logically serve the real needs of the users. Training sessions should be kept relatively small so that the trainer would have the ability to answer questions that were in the minds of the participants. If the group is too large, the personality of the training may be lost, and the trainer may no longer be able to take into account the special needs of the individual trainees. The project team should take into account the different levels and dynamics of the group and strive to tailor the training to the needs of the group. The quality of training should be remembered to be monitored periodically by collecting feedback from system users.

The project team should remember that the training should develop the skills of both salespeople and sales management in relation to the CRM system. These functions are part of change management but also the sales organization's commitment to the CRM culture. The Project team should ensure that the

business unit's sales management is confident in understanding the full scope of CRM, including the benefits of the system as well as potential challenges. The project team should organize workshops for sales management, where they will be presented with all development tasks related to the CRM system and their goals.

Customized workshops for sales offices will be organized for entities with a level of expertise sufficient to take on the advanced features of the CRM system. Before organizing additional training, the entire sales office must have a clear desire to adopt new features. The key is to get the full support of the operative manager of that sales office, as, after training, the sales office manager should oversee how the new features will serve the sales office as a whole.

### 6.2.3 Technical development

All three levels of the sales organization emphasized the incompleteness of the system in terms of a particular technical aspect. The project team should pay more attention to technical and operational change requests for the CRM system and strive to improve their handling. Feedback should be collected systematically and processed in a transparent manner. Feedback should follow throughout their life cycle. The major change requests that came up during the interviews are presented in the table below.

Table 2. Request for improvement

Sales organization level	Request for improvement
Strategic Management and Operative Management	1. The system is not fully integrated with other business processes. Strategic management required sales to enter all sales mandatory data into the CRM system. However, business unit reporting is not done through a CRM system completely. Old reporting formats are still used alongside. That approach causes extra work for strategic management.

	<ol style="list-style-type: none"> <li>2. Due to the technical features and implementation of the system, major business transactions are not integrated with CRM systems at the moment. This feature also forces sales management to keep the old reporting format alongside CRM reporting.</li> <li>3. Currently, the CRM system is used for most parts as a Quotation tool, and not as the traditional CRM tool where all information related to the interaction process with the customer is saved in the system. The features had to be expanded in those sales offices where operational management is ready for the change.</li> </ol>
Salespeople	<ol style="list-style-type: none"> <li>1. All processes that cause extra work for salespeople should be addressed through process harmonization.</li> <li>2. Technical issues due to systems integration or other IT related issues beyond the salespeople control should be fixed.</li> </ol>

In order to ensure that, in the long term, all levels of the sales organization operate the system in complete independence, the system should be technically in optimal condition and fully meet the objectives set for it. A CRM system is best rooted in a sales organization when it is a natural part of doing across the board. The Project team should ensure that the technical solutions and implementations of the system are in line with the needs of the sales organization. The features of the system should not conflict with business processes. On the contrary, the system should support and facilitate the daily activities of users. Any additional work caused by the CRM system should be eliminated through better design and process harmonization. As long as there are IT-related or process-related

deficiencies in the system, it is possible that users will feel the system is incomplete. It is possible that levels of sales organization will start to resist the CRM system if their views and wishes are not taken into account.

### **6.3 Industry BU Change Model**

As a summary of the study Industry BU specific change process model has been created to better visualize the results obtained.

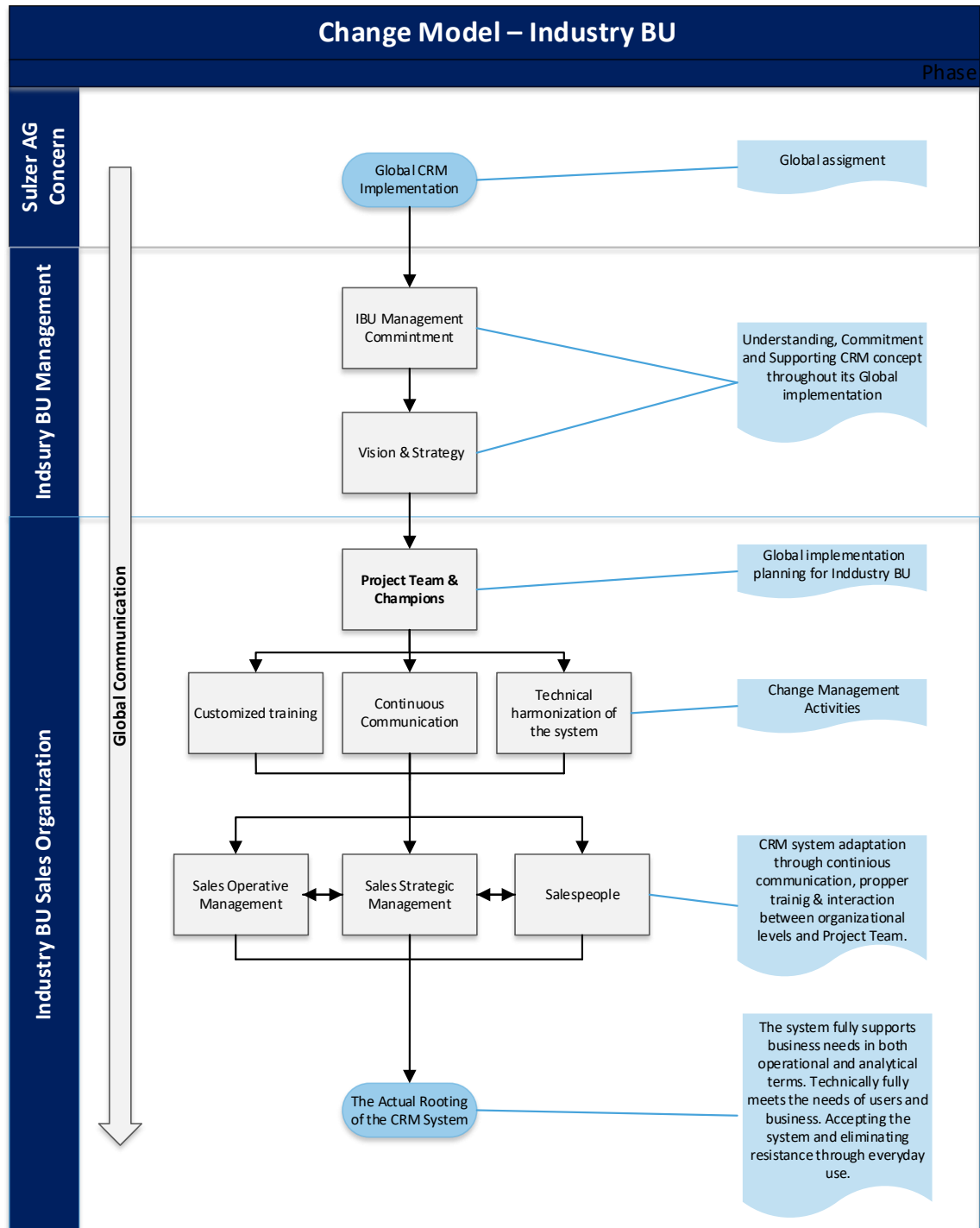


Figure 5. Industry Business Unit Change Model

According to Figure 5 change model for Industry BU considers the company group level Sulzer AG from which the global CRM project assignment comes. The next level of the model is Industry Business Unit (IBU) management. At that level, there is an understanding of, commitment to, and support for the CRM

concept during global implementation. The final level is the IBU Sales Organization. At that level, the business unit's project team with Champions implements the project based on the IBU's vision and strategy. The key change management factors and the interaction between sales organization levels have been taken into account in the implementation. The final step is the actual rooting of the CRM system.

#### **6.4 Research limitation and suggestions for further research**

It is always possible to make mistakes in research in terms of both reliability and validity. The credibility of a study can be examined by its reliability, i.e. reproducibility, and its validity. However, these measures of reliability are strongly related to quantitative research and are therefore not fully suitable for evaluating qualitative research. The reliability of a study is good if its result could be reproduced, for example, by another researcher or by re-examining the same person. (Hirsjärvi et al., 2010, 231- 232)

The reliability of this study is affected by the fact that it is a qualitative case study for a selected group. The interviews in the study were conducted as thematic interviews, so not all interviewees addressed exactly the same perspectives and issues. The results of the research were also not directed in any particular direction, but everyone was allowed to express their own ideas on different themes. The interviews sought to clarify almost the same things from everyone, but as the interviews progressed in their own way, the responses did not fully match. As a result, presenting the same themes to another group may not produce similar results. The same is true for a different researcher who might steer the discussion in a different direction. Reproducibility of results may not be possible with another researcher or study set for these reasons.

In this study, the researcher had an indirect relationship with the interviewees because they represented the same organization. However, the researcher did not have the opportunity to influence the results of the studies, and this naturally improves the reliability of the study. The validity of a study, on the other hand,

refers to the ability of the study to measure exactly what is to be measured. (Hirsjärvi et al., 2010, 232-233)

As a research method, a qualitative case study was well suited to this study, as the aim of the case study is to increase understanding of the subject under study and not to generalize the results in any other way. The theoretical framework of the study answered the research questions well and supported the search for their answers. However, the theoretical framework could have included more English language sources to improve the depth of the study.

The research group involved in the study is quite large, so the results of the study can theoretically be generalized. The research group for this study comes from a single organization, so theoretically, the results can be generalized to a single organization. On the other hand, the results of qualitative research are not intended to be generalized. The novelty value of this study is relatively small because from the beginning, it was not the main purpose of the study. However, that study may help sales organizations in the change implementation process in the context of a CRM project. These results may fit in organizations with global operations and centralized change management. Through change management, a better degree of implementation of a CRM system is a topic that may be of interest not only to organizations but also to students. This research could be further developed by focusing more closely on change management factors related to different cultural factors. On the other hand, more recent change management models that take into account the chaotic business environment and degree of digitization of the existing processes could be examined even more closely.

In the project team, the research topic was considered important from the beginning. At the start of the study, it was very challenging to know perfectly clear how the study should be completed. It can be said that while working with the theoretical framework, the picture of the whole was partially lost. However, getting to know the research section based on the research problem clarified the right direction. Almost immediately after the empirical part of the research had

begun, the research commissioner decided to increase the role of the research by expanding the number of interviewees.

The research original plan was to interview a few operational managers as well as salespeople, but the research commissioner wanted the group to be global considering the six regions, but also to participate in strategic sales management in order to increase the depth of the study. In this regard, the research commissioner also gave advice that was relevant to doing the work and clearly helped in the research process. The advice was that the research part of the study and the master's thesis as a whole could be done either well or poorly, and the author always decides for himself how he wants to do it. That advice had a significant motivating effect. Otherwise, the researcher had complete freedom to carry out the research forward as desired.

The empirical part and the interviews were the most interesting part of the research process. The interviews produced a lot of new ideas and practices for the research problem. Through them, a comprehensive and sufficient cross-section at different levels of the sales organization had been achieved. At the same time, they helped to approach literature in a whole new way. Partly for this reason, after the interviews, the theoretical framework of the study had been modified.

The research process as a whole can be considered successful. First, it was a very interesting learning process and helped to deepen the understanding of change management as well as the interesting and deep world of CRM. The data and results obtained correspond optimally to the research problem.

Understanding these aspects may also help in another context in the future, as we live in a hectic world where change is constantly present in our daily lives. Positive feedback from the research commissioner on the work done can also be considered an important argument for success.

At the time of the study, most of the argument in the literature about the complexity and inconvenience of the CRM project has proved true. A project can

fail in many different ways, depending on how success is measured. The technical side of a CRM system is certainly the smallest thing in this equation. Things that really have a big impact on success include participatory leadership, a broad understanding of the CRM concept at the organizational level, and commitment to the project. Based on the research results and the analysis made, it is important to mention that Sulzer's global CRM project was initiated and partly managed from the top of the Group level. If the project were purely business-level (Industry BU), it is possible that the organization and implementation of the project would have been done differently. In particular, change management could have been planned and taken forward differently. In this case, the whole CRM idea came from the Sulzer AG group level. The CRM concept was so-called "given" to the pump division and thus to the business level. As a result, it was not entirely possible for Industry BU to create a complete need for change through the sales organization well in advance of the change. In this sense, the project was not completely under business-level control. It is possible that the speed and quality aspects of change would be different if the project were business-level from the outset.

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## **INTERVIEW QUESTIONS**

Three different groups were used in the Sales Organization interviews: strategic management, operative management, and salespeople. Operative management and salespeople interview questions were almost the same.

### **Questions for strategic management**

#### **Deployment**

- How did deployment of the new CRM system go? How could it have been improved?
- How has the organization / sales received the new CRM system?
- Is the system used by all intended users?
- Is the sales management in any way motivating sales reps to use the system?
- How could the sales management motivate sales reps to use the system?
- What is the biggest benefit and the biggest issue of a new CRM system?
- What kind of change resistance has come across related to the CRM deployment?
- How can resistance be reduced or eliminated?
- How will the removal of the system harm the business?

#### **Support**

- Are there clear rules for using the new CRM system? Is there a need to update / add something?
- Are there clear instructions for using a new CRM system? Is there a need to update / add something?
- Is there user support enough?

**Communication**

- How are the different stages and progress of CRM implementation communicated to the organization?
1. How are new changes related to the CRM system are presented to the organization?
  2. How can the organization / sales comment on the CRM project?
  3. Is CRM related communication enough? How can it be improved?

**Project team**

- How can the project team improve the IBU system users') acceptance of the new CRM system?
- How does the project team deal with feedback and criticism from the system users)?
- How can the project team improve its own operations?
- How do you understand change leadership?
- Do You want to tell something else that might help a company?

## Questions for operative management and salespeople

### Deployment

- How did deployment of the new CRM system go? How could it have been improved?
- How has the organization / sales received the new CRM system?
- Is the system used by all intended users?
- Is sales management committed to the deployment project? Is management actively using the CRM system?
- Is the sales management in any way motivating sales reps to use the system?
- How could the sales management motivate sales reps to use the system?
- What is the biggest benefit and the biggest issue of a new CRM system?
- What kind of change resistance has come across related to the CRM deployment?
- How can resistance be reduced or eliminated?
- How will the removal of the system harm the business?

### Support

- Are there clear rules for using the new CRM system? Is there a need to update / add something?
- Are there clear instructions for using a new CRM system? Is there a need to update / add something?
- Is there user support enough?

### Communication

- How are the different stages and progress of CRM implementation communicated to the organization?

- How are new changes related to the CRM system are presented to the organization?
- How can the organization / sales comment on the CRM project?
- Is CRM related communication enough? How can it be improved?

**Project team**

- How can the project team improve the organization's (IBU system users') acceptance of the new CRM system?
- How does the project team deal with feedback and criticism from the organization (system users)?
- How can the project team improve its own operations?
- How do you understand change leadership?
- Do you want to tell something else that might help a company?