Foundations, Design, and Integration of Customer Relationship Management (CRM) Systems Within Corporate Knowledge Management Strategies

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In highly competitive markets, companies need to secure their long-term viability by establishing and maintaining competitive advantages using Customer Relationship Management (CRM) systems. The way these systems are designed significantly impacts a corporation's future growth and profitability and should be recognized as a key factor in the success of corporate knowledge management. This paper aims to identify the design features and prerequisites of CRM systems that contribute to increased sales, the expansion of corporate knowledge, and overall organizational development. An empirical study conducted in 2019 within the Austrian packaging industry (Moser, 2021) highlights the importance of identifying CRM system requirements that enhance user acceptance. The design criteria identified can guide the implementation of future CRM projects, ensuring proper use and approval, and contribute to the development of a comprehensive CRM strategy that integrates corporate knowledge management.

Keywords: customer relationship management (CRM), competitive advantage, corporate knowledge management, CRM system design

INTRODUCTION

In buyer markets, the role of consumers is crucial. During the industrial age, companies created control systems to manage material and financial resources efficiently (Chandler, 1977, p. 21). To remain competitive and address customer needs in the digital era, organizations must be effectively supported and managed (Binckebanck & Elste, 2016, p. 48).

The greatest potential for creating unique competitive advantages lies in the quality of customer interface management (Helmke, Uebel & Dangelmaier, 2017, p. 5). Implementing professional CRM systems provides an opportunity to stand out from competitors (Swift, 2001, p. 14). CRM systems can more effectively fulfill strategically important tasks by leveraging IT solutions to build and maintain valuable, long-term customer relationships. These systems can help increase profits by reducing costs and boosting sales (Stokburger & Pufahl, 2002, pp. 16-17). Rather than being a short-term project or a single IT solution, CRM represents a comprehensive, customer-focused strategy that must be integrated into an ongoing organizational learning process (Hippner & Wilde, 2004, p. 15).

Employee acceptance is a critical factor for the success of a CRM system, as its effectiveness depends on how well employees implement and utilize it (Schüller, 2007, p. 11). Without employee buy-in, the

success of a CRM system's implementation is questionable (Hildebrand, 2015, p. 13). Therefore, it is essential to examine the factors that influence daily use and acceptance of a CRM system within a sales department (Homburg, Wieseke & Kuehnl, 2009, pp. 159-168). Common reasons for employee resistance include feelings of insecurity and fear of being overwhelmed by new innovations (Helmke, Uebel & Dangelmaier, 2017, pp. 280-281).

The acceptance and effective use of CRM systems are closely linked to key economic disciplines, such as knowledge management, organizational development, and change management. Knowledge management, which involves the systematic handling of knowledge, is essential for gaining competitive advantages in rapidly changing business environments (Kohl, Mertins & Seidel, 2016, p. 1). The success of knowledge management strategies is evaluated by their ability to strategically develop and assess organizational knowledge bases (Seyr & Hoffer, 2020, p. 1).

Organizational development remains a critical concern for most companies, as they continually seek to optimize or improve their structures. Change management focuses on effectively guiding corporate transformations (Lauer, 2019, p. 6). CRM plays a vital role in enhancing sales functions, consolidating sales activities under unified leadership, strengthening product management, and assessing management margins (Schifferer & von Reitzenstein, 2018, p. 20). As we progress toward Industry 4.0, the generation and exchange of data between machines ("Big Data") will continue to grow. However, value is created only when data and information are transformed into new knowledge. Employees and organizational knowledge bases remain among the most crucial factors for success and sources of productivity.

OBJECTIVES, RESEARCH GAP AND RESEARCH QUESTIONS

Anticipating changing customer needs, identifying market opportunities, and exploring new target groups are crucial for optimizing value creation (Stokburger & Pufahl, 2002, pp. 16-17). This article aims to identify the design features and prerequisites for CRM systems as essential components of knowledge management that contribute to sales growth and overall corporate development. By examining management concepts that illuminate the phases of customer relationships, the goal is to gain a competitive edge through effective CRM design that fosters lasting and profitable customer connections, thereby ensuring long-term corporate viability (Stokburger & Pufahl, 2002, pp. 16-17).

Additionally, the article explores factors that increase user acceptance of CRM systems, particularly among employees. Identifying these criteria is crucial for successful CRM implementation, ensuring proper usage and achieving the objectives of a holistic CRM approach. The study aims to develop a requirement profile that boosts employee motivation and system adoption.

The article also presents measures based on a representative case study to assist companies in implementing CRM systems within sales departments. The focus is on identifying acceptance factors and assessing the influence of sales employees during CRM introduction, determining at which phase specific acceptance dimensions become relevant.

For CRM to enhance sales, it must be integrated with a customer-oriented approach rather than solely product-focused. Implementing CRM requires reorganizing various organizational and technological processes. A requirement analysis will identify the most beneficial CRM functionalities for the company (Holland, 2004, pp. 25-26).

The primary goal of CRM is to increase corporate value through higher customer satisfaction and retention. Despite the practical interest in CRM concepts, there is a lack of empirical studies measuring their success. Some studies have examined financial outcomes of CRM implementations but were not industry-specific or inclusive of a wide range of company sizes, leaving methodological challenges partially unresolved (Selchert, 2004, p. 27). While Varajão and Cruz-Cunha (2016) identified motivations for CRM adoption in Portuguese companies, they did not explore its impact on sales (Varajão & Cruz-Cunha, 2016, p. 1269). Similarly, Li and Mao (2012) focused on internal sales management benefits from CRM but did not address sales-related design features of CRM systems (Li & Mao, 2012, p. 269).

To fill these research gaps the following **research questions** are derived:

1. Which design features of CRM systems (as part of corporate knowledge management) have an impact on the turnover of corporations and which general requirements need to be fulfilled?
2. Which are the necessary criteria and recommendations to increase the user acceptance and furthermore the success of CRM systems to contribute to the overall goal of an increased profitability and development of corporations?

RESEARCH METHODOLOGY

The chosen research design is a case study, focusing on a representative social element as the investigation's subject. In 2019, an internationally leading packaging corporation was examined. Hypotheses were derived from scientific literature and qualitative research, then tested through a quantitative survey.

Qualitative data was collected via problem-centered interviews, with questions targeting CRM system design features to boost sales and corporate development. The quantitative survey aimed to identify factors influencing employee acceptance of CRM systems.

The qualitative data was categorized and analyzed, with findings discussed in relation to existing literature (Mayring, 2016, pp. 115-116). The quantitative study sought to uncover barriers to CRM system acceptance, prioritize sales employee needs, and determine optimal CRM design features to enhance corporate development. The goal is to create a technology design that motivates sales staff to engage with CRM systems without resistance, minimizing the high risk of failure when introducing such systems.

This research holds practical and theoretical relevance, emphasizing the importance of an acceptance-oriented technology design to reduce failure risks. Involving employees early in the process is crucial to align CRM systems with user needs and lower flop rates. Given the costs and risks, the study is vital for other corporations planning new system implementations in sales.

The quantitative survey targeted sales department personnel with CRM system experience, using a standardized online questionnaire with Likert-scale questions for comparison. The survey used a quota sampling method (see Tab. 1), focusing on internal sales staff, particularly within the packaging industry. Characteristics such as industry-specific sales roles were considered to ensure the sample reflected the population's distribution. The sample was calculated based on statistical data, with a focus on sales employees within Austria's packaging industry. In 2019, out of 14,961 total employees in this industry, approximately 4,125 were white-collar workers, with an estimated 3% employed in sales (WKO, 2019).

TABLE 1
QUOTA PROCEDURE

Quota procedure
Number of total employees in the packaging industry: 14,961
Number of white- collar workers in the packaging industry: 4,125
Sales force approx. 3% of white-collar workers
~ 120 sales employees to be surveyed

Source: Authors' figure

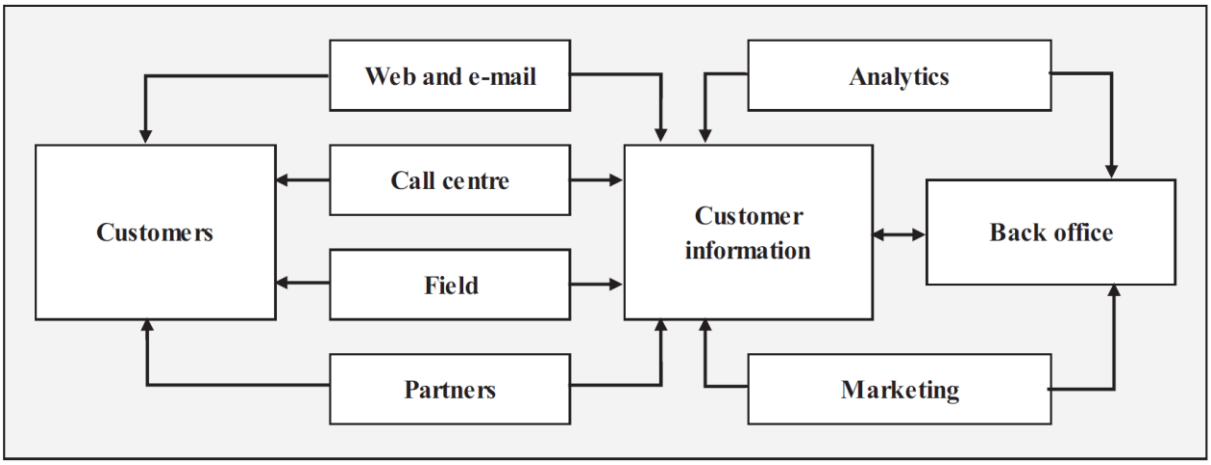
The statistics program SPSS was utilized to organize and prepare existing market research data for evaluation. Descriptive statistics, including frequencies, were used for analysis, and cross-tabulations were employed to test the hypotheses. These hypotheses were derived from the qualitative research analysis.

CRM AS HOLISTIC CONCEPT

Organizations must increasingly focus on CRM due to rapidly changing market conditions. The emphasis shifts from the product itself to the relationship with the customer. All company activities need to be systematically planned, executed, controlled, and adjusted with a focus on profitable customer relationships. In this context, customer satisfaction, loyalty, and the systematic, individualized management of customer relationships are crucial (Meffert, Pohlkamp & Böckermann, 2010, pp. 5-6).

Implementing CRM helps identify key actions and dimensions for managing customer relationships. It involves managing knowledge across various interaction channels over time to coordinate ongoing client relationships. CRM allows companies to use information strategically to guide their client management approach. Companies leverage CRM data to attract new clients, retain existing ones, and enhance relationships through cross-selling and personalized communications (Palmatier, Kumar & Harmeling, 2018, p. 58). CRM represents the comprehensive management of a company's interactions with its clients, requiring the integration of distribution, communication, and supply strategies aligned with customer needs. Client satisfaction is the primary measure of CRM success, as it reflects customer loyalty and ultimately influences the long-term success of the organization (Helmke, Uebel & Dangelmaier, 2017, p. 7). By identifying, building, and securing a profitable customer base, CRM optimizes a company's customer portfolio (Sperl, 2016, pp. 41-43). As a customer-oriented corporate strategy, CRM necessitates a reorientation of business processes and responsibilities (Leußer, Hippner & Wilde, 2011, p. 18). CRM systems, as part of IT tools, support various administrative functions from a technological perspective. The trend is moving towards a more holistic understanding of CRM and its diverse components (Perna & Baraldi, 2014, p. 57).

FIGURE 1
CUSTOMER RELATIONSHIP MANAGEMENT (CRM)



Source: Authors' figure

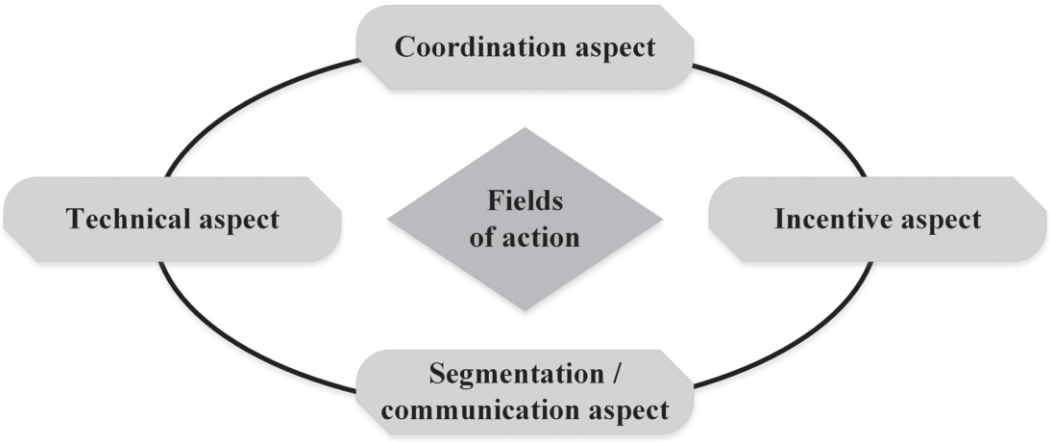
As depicted in Fig. 1, managing customer interactions across various communication channels – such as call centers, web applications, emails, dealers, partners, and field sales – is crucial. Success hinges on effectively coordinating direct customer interactions with back-office operations. All customer data must be collected, analyzed, and utilized meaningfully. The key challenge is making it easy for customers to conduct business in their preferred way, at any time, through any channel, and in any currency or language (Rai, 2013, p. 31).

CRM should provide tangible benefits to both customers and suppliers, enhancing efficiency and effectiveness. For customers, this might mean reduced risks or lower costs, while suppliers benefit from stronger, long-term relationships (Meffert, Pohlkamp & Böckermann, 2010, pp. 7-8). Companies that

maintain close collaborations with clients tend to achieve higher relationship profitability, thanks to the positive impact of targeted CRM strategies. B2B relationships place unique demands on suppliers, making CRM particularly important (Schumacher, 2005, p. 28). However, classifying customers accurately can be challenging due to client-specific needs, often leading to incorrect or illogical groupings (Narayandas & Rangen, 2004, p. 63). Customers are often seen as unique, and generalizations are typically viewed as inappropriate (Laiderman, 2005, p. 64). Therefore, CRM data must be organized to allow for meaningful longitudinal or cross-sectional analysis (Zahay, Peltier & Krishen, 2012, p. 5).

CRM aids in gathering critical customer information, enhancing customer care quality and confidence. It should improve the organization's responsiveness to customer support needs, reduce customer churn, and lower promotional and related costs (Stein, Smith & Lancioni, 2013, p. 855). All CRM-related data and market intelligence should be accessible to decision-makers within the company (Rigby & Ledingham, 2004, p. 118). However, in many companies, only a few executives are aware of the availability and use of CRM data. This issue ties directly to knowledge management, which should facilitate the distribution and use of customer-related knowledge across the organization. When executives understand the advantages and practical applications of CRM data, it becomes an asset in decision-making processes. Therefore, it's essential to begin by training those who generate the data (sales staff) and those who will use it for decision-making (executives). The full profitability of CRM is realized through consistent information gathering and flexible decision-making (Stein, Smith & Lancioni, 2013, p. 856).

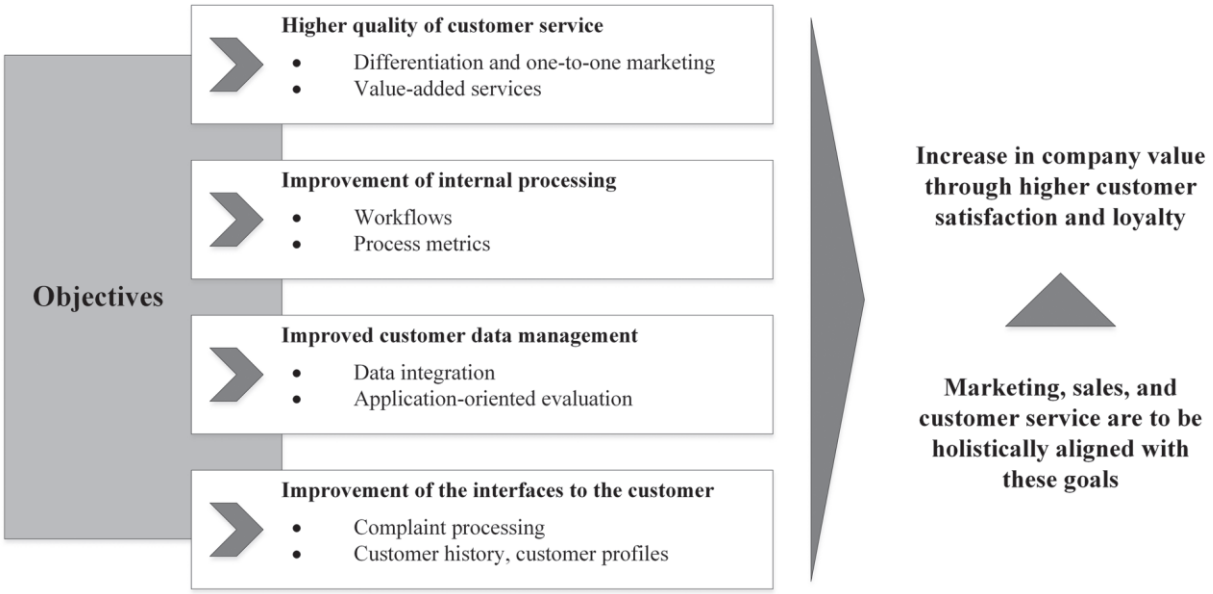
FIGURE 2
REQUIREMENTS FOR CRM



Source: Meffert, Pohlkamp & Böckermann (2010, p. 23)

As shown in Fig. 2, there are four key prerequisites for CRM success and achieving multi-dimensional competitive advantages. First, the coordination aspect involves managing internal and external processes and establishing the necessary organizational conditions. Business units must be aligned to create a comprehensive view of all customers that can be effectively utilized. Second, the incentive aspect focuses on making CRM attractive from both the customer and supplier perspectives. By integrating customer knowledge early and continuously, companies can create market entry barriers for competitors and develop unique selling propositions. Third, the knowledge aspect emphasizes the importance of understanding customers to drive innovation, better fulfill their needs, and build change barriers and emotional connections. This aspect also includes using customers' preferred communication channels. Finally, the technical aspect includes IT and system requirements, highlighting the role of new technologies in supporting CRM initiatives (Meffert, Pohlkamp & Böckermann, 2010, pp. 23-24).

FIGURE 3
GOALS OF THE CRM APPROACH



Source: Helmke, Uebel & Dangelmaier (2017, p. 7)

CRM is often reduced to just its technological components or treated as a mere software project focused on acquiring, storing, and analyzing customer data (Stauss & Seidel, 2002, p. 11). This narrow perspective can lead to neglecting the necessary organizational framework, resulting in technology that exists without customer-oriented processes (Hippner, 2005, p. 116). The true goal of CRM is to elevate customer service quality by holistically addressing customer needs. This involves improving data processing, customer data management, and customer interfaces, which, in turn, should enhance company value, customer satisfaction, and loyalty. Achieving these goals requires aligning marketing, sales, and customer service efforts (Dangelmaier, Uebel & Helmke, 2004, p. 5).

Higher customer satisfaction leads to stronger client retention, positively impacting profitability (Helmke, Uebel & Dangelmaier, 2017, pp. 7-9). The holistic CRM approach seeks to more efficiently distribute customer information within the organization to improve how customer relationships are managed. The focus is on increasing the quality of customer interactions by consistently targeting customer-oriented goals (Helmke, Uebel & Dangelmaier, 2017, pp. 7-10). Customer satisfaction, driven by effective corporate practices, is a key construct in management research (Bednarek, 2014, p. 15).

In the context of Industry 4.0 and digitization, markets are evolving rapidly. Success is no longer about the product itself, but the value offered to the customer. Digitization allows companies to enhance products by offering individualized solutions, better support, or additional services, thereby increasing their value (Robra-Bissantz & Lattemann, 2019, p. 3). Social media, as a progression of the internet, simplifies interactions but raises concerns about privacy and data use, highlighted by the 2018 Cambridge Analytica scandal involving the misuse of Facebook data (Isaak & Hanna, 2018). This incident led to discussions on regulating social media, prompting companies to focus more on privacy issues (Alt & Reinhold, 2020, p. V). CRM is increasingly supported by the digitization and integration of service delivery, negotiation, and administrative processes, alongside improved access to information (Kleinaltenkamp, Plinke & Geiger, 2015, p. 290).

CRM should be integrated with knowledge management theories, making it a core part of the company's information system rather than an isolated solution. According to North's "Knowledge Staircase" model, CRM should evolve from basic data processing (first degree of maturity) and isolated solutions (second degree) to an integrated component of a professional knowledge organization (third

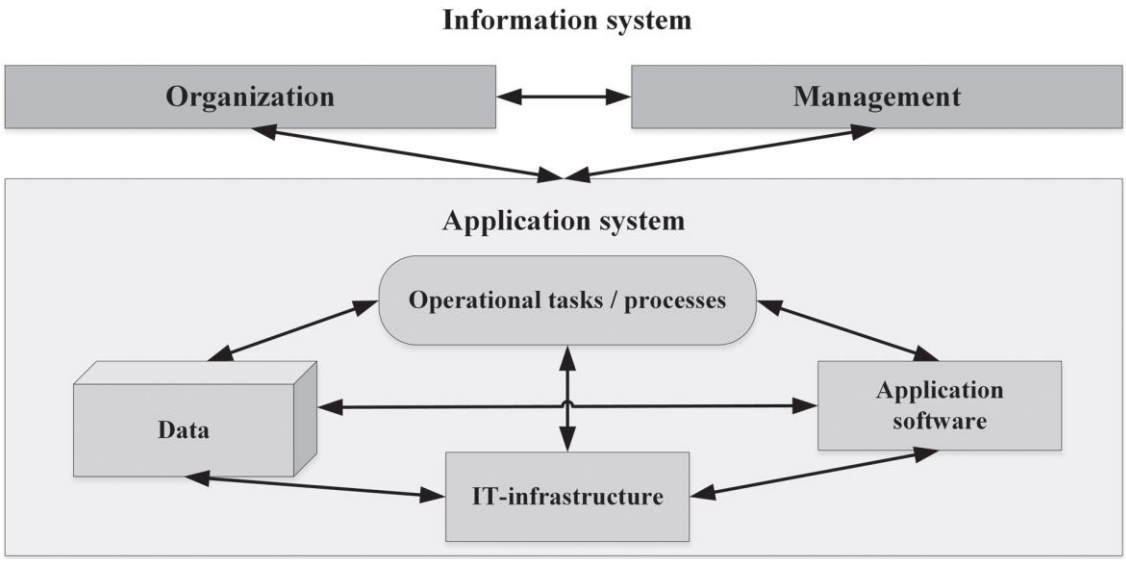
degree), and eventually to a critical resource for knowledge-oriented business management (fourth degree) (North, 2021, pp. 33-69). This progression requires interlinking and applying knowledge, along with motivating and training employees to maintain competitiveness. In essence, CRM should not just be a data repository but a dynamic foundation for decision-making and action, embedded in a holistic knowledge management strategy (Migdadi, 2020).

Empirical studies show that many organizations overlook the need for successful knowledge management, including CRM, to encompass three perspectives: human, organizational, and technological (Seyr, 2015, pp. 3-27). Often, knowledge management is seen as a technological issue, while employee motivation and organizational implementation are neglected. Effective knowledge management should be a top management priority, not just an IT responsibility, to unlock its potential as a driver of productivity, innovation, and competitiveness.

CRM SYSTEMS AS IT SOLUTIONS

The concept of managing client data to understand their identity, operations, value, and interaction depth didn't initially emerge as a structured "CRM system." It began as a basic need across various companies to manage client data, leading to the development of early CRM solutions (Mathena, Yetter & Hostetler, 2009, p. 4). Information and communication technologies have since become crucial for implementing CRM, with the technological aspect – encompassing IT requirements and the use of new technologies – being a key factor in effectively managing customer relationships (Meffert, Pohlkamp & Böckermann, 2010, pp. 23-24).

FIGURE 4
CORRELATION BETWEEN INFORMATION AND APPLICATION SYSTEM



Source: Laudon, Laudon & Schoder (2010, p. 18)

CRM systems are often perceived as mere tools for collecting and analyzing customer data, but this narrow view can overlook the necessary organizational framework that supports a comprehensive information system (Leußer, Hippner & Wilde, 2011, pp. 17-18). As shown in Fig. 4, these systems play a crucial role in enhancing the overall coordination between organizational and management tasks, as well as operational processes. CRM systems help track and analyze customer interactions to improve revenue, profitability, and customer satisfaction, while also streamlining internal processes through automation

(Neumann, 2014, pp. 115-116). By better managing customer data, companies can achieve a more customer-oriented approach and gain competitive advantages (Torggler, 2007, p. 7).

The primary functions of CRM systems revolve around improving client handling processes, developing new services, enhancing data analysis, and supporting new marketing tools. CRM systems integrate various components to fit seamlessly into a company's IT infrastructure, leading to diverse functionalities (Helmke, Uebel & Dangelmaier, 2017, p. 10). These functionalities are divided into three main areas: Communicative (or Collaborative) CRM, Operative CRM, and Analytical CRM.

Communicative CRM focuses on managing and coordinating communication channels between companies and customers, ensuring a consistent and up-to-date customer experience across all platforms (Neumann, 2014, pp. 116-117). Operative CRM supports and optimizes customer interactions, providing employees with tools and information to enhance client support, particularly in sales, marketing, and service automation (Wilde, 2011, pp. 46-47). Analytical CRM systematically records and evaluates customer data to continuously optimize customer-related business processes. It forms the foundation for Communicative and Operative CRM, facilitating a "closed-loop architecture" where operational data feeds back into analytical processes for ongoing improvement (Helmke, Uebel & Dangelmaier, 2017, p. 14).

ORGANIZATIONAL AND TECHNOLOGICAL PREREQUISITES

A CRM system can only reach its full potential when a customer-oriented strategy is aligned with the necessary corporate requirements. The company must establish incentives for customer engagement and ensure reliability with consistent contact points. Implementing a customer relationship strategy inevitably leads to changes for employees, requiring them to adjust work processes and behaviors when interacting with customers. There must be a willingness within the organization to share customer knowledge. These changes need to be accepted and actively practiced creating the right conditions for an effective CRM concept (Georgi & Mink, 2011, p. 83).

The organizational structure must support customer-oriented processes and information flows, ensuring alignment with customer needs. It's essential that the entire organization understands what CRM entails (Neumann, 2014, p. 138). Key success factors include the involvement and commitment of top management from the start, as they create the conditions necessary for successful project implementation. Delegating responsibility to lower-level managers can jeopardize the success of a CRM project, as they may lack the authority to make necessary cross-departmental changes (Neumann, 2014, pp. 147-148).

A successful CRM system must provide accurate, current, and complete customer information. This involves gathering data at every customer touchpoint, evaluating it, and supporting all related activities, particularly those directly impacting the customer. Aligning company processes with customer needs is crucial, as is ensuring data quality, timely analysis, and compliance with data protection regulations (Leußer, Hippner & Wilde, 2011, p. 751).

Often, organizational information is scattered across various systems and databases, making it challenging to align processes with customer needs. Integrating existing data management systems into a unified CRM system helps avoid redundant data storage and provides access to data across different systems. During CRM system implementation, it's important to assess existing marketing, sales, and service processes by creating flow and task diagrams (Schulze, 2002, pp. 36-37, 158-159).

ECONOMIC EFFECTS OF CRM

Value-oriented management evaluates marketing activities based on their positive impact on a corporation's overall value, but quantifying intangible assets like customer knowledge and relationships can be challenging. Customer relationships, as part of relational capital, significantly contribute to a company's goodwill, and strong, long-term customer loyalty can positively influence long-term success (Krafft & Götz, 2011, pp. 216-217).

Customer proximity refers to the level of interaction between customers and companies. It is essential to retain and utilize all customer-related information for product or service improvement. Understanding customer needs through close interaction allows companies to tailor products, establish individual relationships, and streamline processes between providers and customers (Schumacher & Meyer, 2004, p. 26-27).

Customer satisfaction is defined as a positive emotional response when a customer's expectations are met or exceeded. Measuring customer satisfaction can be challenging due to its qualitative nature, with no single method for quantifying it universally accepted (Krafft & Götz, 2011, pp. 222-223).

Customer retention involves maintaining ongoing business relationships characterized by repeated interactions. It is influenced by economic, psychological, and social factors, customer satisfaction, and the appeal of competitors' offers. High customer retention correlates with repeat purchases, positive attitudes towards the supplier, and increased likelihood of recommendations. Long-term customer retention also leads to higher sales, more referrals, and shorter consultation times (Krafft & Götz, 2011, pp. 226-228).

Key metrics for assessing the economic value of customer relationships include turnover, margin contribution, and customer value. Research shows that long-term customer relationships lead to higher sales and that higher customer retention is positively linked to purchasing behavior, resale, and customer recommendations (Krafft & Götz, 2011, pp. 231-233).

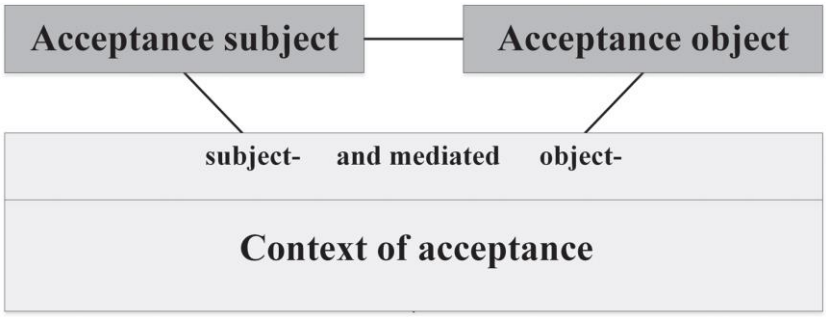
ACCEPTANCE THEORY

Implementing a CRM system is a complex process that involves both the technical and organizational aspects of a corporation. It should be treated as a strategic project that shapes the future of customer management. During a comprehensive CRM audit, critical elements such as software selection, alignment with company goals, process reorganization needs, and change management must be carefully defined. The success of CRM implementation hinges on user acceptance, which requires demonstrating the value and benefits of the system to all users (Helmke, Uebel & Dangelmaier, 2017, pp. 267-270).

Acceptance is a term often used in social and sociological discussions to describe positive or negative decisions, but its definition varies and is not universally agreed upon. It generally refers to the willingness of users to engage with a system, identify with it, and utilize its potential effectively. The term is frequently used interchangeably with recognition, approval, and endorsement, although its precise definition is increasingly difficult due to its broad use (Kollmann, 1998, p. 37; Betz, 2003, p. 97).

In scientific discussions, acceptance is understood as the relationship between an acceptance subject (such as an individual or group) and an acceptance object (like a technical system or innovation) within a specific context. This relationship is often illustrated using an analytical triangle that represents the subject, object, and context (Lucke, 1995, pp. 88-89).

FIGURE 5
ACCEPTANCE TRIANGLE



Source: Lucke (1995, p. 89)

The concept of acceptance varies widely based on the context and objectives of the investigation (Königstorfer, 2008, p. 10). In this analysis, CRM system acceptance is understood as the recognition and willingness to use the system efficiently, which is essential for positively impacting corporate growth.

In economic acceptance research, there's a distinction between attitude-based and behavior-based acceptance. Attitude-based research links acceptance to attitudes, which are inferred from verbal and non-verbal responses (Trommsdorff, 2011, p. 159). Behavioral acceptance, on the other hand, equates acceptance with measurable behavior or actual system usage, emphasizing a willingness to engage with the system (Betz, 2003, p. 109).

In Business Information Systems (BIS), acceptance typically refers to the adoption of application systems. Research in this field focuses on how users accept or reject these systems, and the organizational strategies employed during system implementation (Amberg, Hirschmeier & Schober, 2003, p. 575). The term "technology acceptance" is often used, emphasizing the human interaction with technical innovations (Dethloff, 2004, p. 18).

From existing models, it's evident that individual, task-related, and technological factors significantly influence BIS acceptance (Allerbeck & Helmreich, 1984, p. 15). In a business context, organizational and management factors also play crucial roles. Effective CRM implementation should be gradual, allowing users to familiarize themselves with the system, with continuous improvements to align with evolving business strategies (Stender, Göbel & Schulz-Klein, 2003, pp. 34-35).

Technology-related factors such as relative advantage, compatibility, complexity, testability, and communicability are key to determining acceptance. While most of these factors positively correlate with system acceptance, complexity can have a negative impact (Kollmann, 1998, p. 120).

Management plays a central role in BIS adoption, as they set the framework for system usage, plan goals, and manage the structural changes required by new technology (Laudon, Laudon & Schoder, 2010, p. 27). Management also influences user attitudes through mandatory system usage policies and by aligning system use with employee qualifications (Picot & Reichwald, 1987, p. 170).

Organizational factors such as the application situation, the company’s environment, and social dynamics within the organization form the backdrop for corporate acceptance and innovation. A company’s willingness to innovate, driven by its culture and structure, can accelerate the acceptance process (Rogers, 2003, pp. 411-413). Organizational culture, reflecting a company’s values and norms, heavily influences its openness to change (Schreyögg, 2016, p. 407).

Task-related factors address whether a BIS can effectively solve specific tasks, with system demands increasing alongside task complexity. The system's ability to support users during tasks and facilitate collaboration across organizational units is crucial for acceptance (Goodhue, 1995, pp. 1,828-1,833).

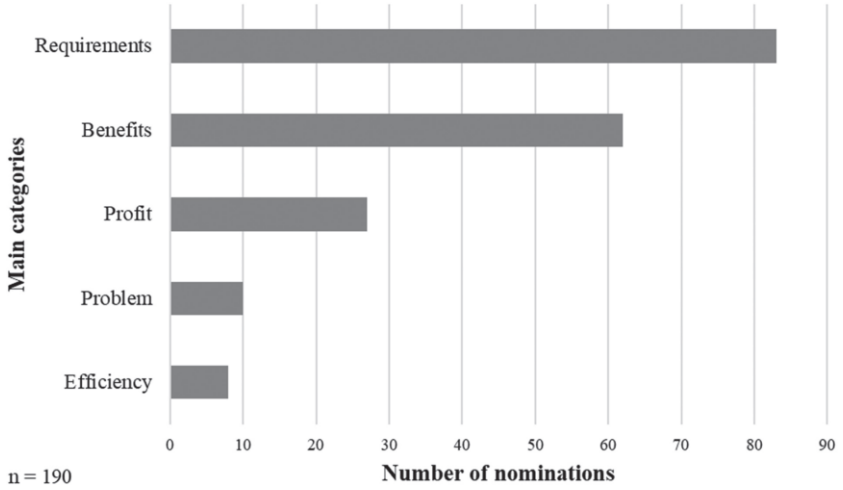
EMPIRICAL STUDY

Qualitative Data Analysis and Results

To gather comprehensive insights, an empirical study was conducted in 2019, involving interviews with sales employees from various regions and hierarchy levels (including regional sales managers, key account managers, and account managers) at a leading international packaging manufacturer (Moser, 2021). The selected participants were those who regularly interact with CRM systems or approaches in their daily work, with a total of fourteen employees chosen for the study. An experimental test was conducted with two interview partners to assess the suitability of the interview guide. Following this, a summary content analysis based on Mayring's approach was prepared, identifying both main and sub-categories.

In a second qualitative research phase, six sales employees and three external CRM experts from CRM system providers were interviewed. The sales staff interviews aimed to identify the factors necessary for CRM system acceptance. The external experts provided additional industry-specific knowledge and objectivity. The findings from these interviews were used to develop a requirement profile for enhancing CRM system acceptance, which was then compiled into a criteria catalog to address the research question.

FIGURE 6
OVERALL ANALYSIS OF THE MAIN CATEGORIES



Source: Authors' figure

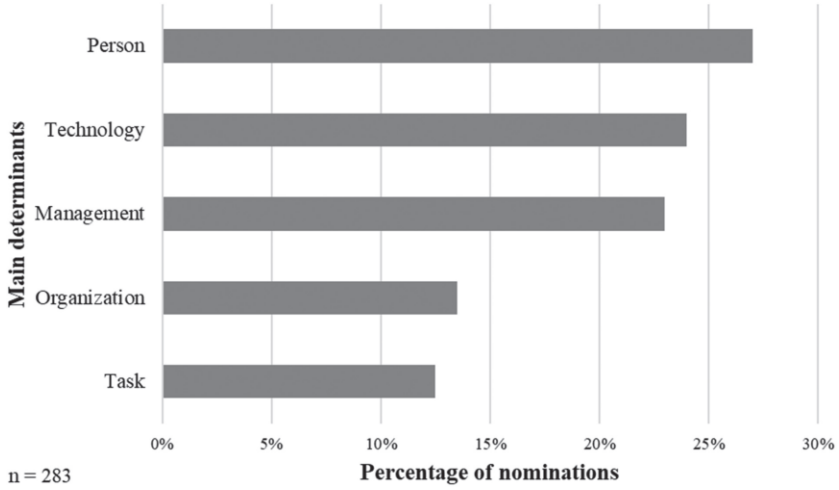
The analysis began with a comprehensive review of the main categories and the number of entries from the guided interviews, which served as the basis for the results. Figure 6 illustrates the overall analysis, highlighting the main categories: requirements, benefits, profit, problem, and efficiency. From the interviews, 190 relevant statements were categorized under these headings. The "requirements" category outlines the necessary conditions for successfully implementing a CRM system to ensure it is properly used and maintained. "Benefits" covers the expected advantages of using a CRM system, while "profit" directly addresses the research question about the impact of CRM systems on company performance. The "problem" category includes potential issues with CRM systems, and "efficiency" pertains to the conditions needed for effective work.

When interpreting the results, it's important to note that sub-categories can appear across multiple main categories, and their meaning should be understood in context. For example, time savings from CRM systems could influence both profit and efficiency, serving as both a requirement and a benefit. The "requirements" category is crucial for understanding CRM system acceptance, leading to a more detailed qualitative and quantitative analysis that offers deeper insights into acceptance criteria. These insights contribute to the broader goal of enhancing profitability and corporate development. The findings from the qualitative evaluation were used to create a profile of requirements and an overview of acceptance criteria for CRM systems.

The "requirements" category focuses on the conditions needed for a successful CRM system implementation, ensuring that employees use and maintain the system effectively. Insights into this category were mainly derived from questions about user experience with CRM systems. The "benefits" category encompasses the anticipated advantages, such as increased customer satisfaction and reduced internal costs. The "profit" category addresses the core research question regarding CRM systems' impact on a company's financial performance. The "problem" category identifies potential challenges with CRM systems, based on user experiences, while "efficiency" explores the factors necessary for efficient work, both generally and within the CRM system.

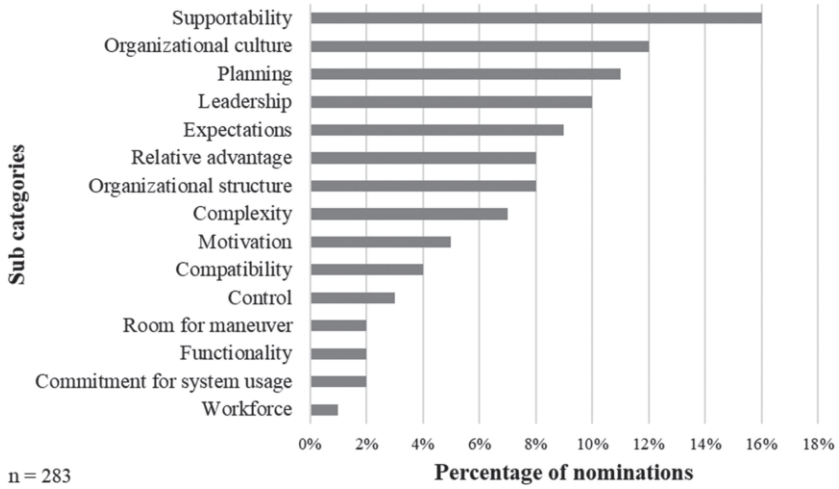
Figure 7 shows the distribution of key factors influencing CRM system acceptance, with a notable similarity in the distribution of person-related, technology-related, and management-related determinants. In contrast, task-related and organizational factors had fewer entries, suggesting that CRM system acceptance is predominantly influenced by personal, technological, and management factors.

FIGURE 7
ANALYSIS OF MAIN DETERMINANTS FOR ACCEPTANCE



Source: Authors' figure

FIGURE 8
ANALYSIS OF SUB-CATEGORIES



Source: Authors' figure

The next step involved classifying the results of the main determinants into sub-categories, based on the sub-categories of CRM system acceptance determinants described earlier. Figure 8 shows that the system's supportability has the greatest impact on acceptance, accounting for 16%. The added value of the system was frequently mentioned in interviews; users need to recognize the system's meaningfulness and the benefits it brings to their daily work. Employees must be convinced that the CRM system is crucial for their daily tasks and overall success as sales representatives. Given that some individuals may resist change, they need to be persuaded that these changes offer them tangible benefits (a key aspect of change management). User-friendliness is also critical, as a lack of it will likely result in low utilization rates.

The analysis further highlighted the importance of fostering an organizational culture that is supportive of and open to innovative technologies (12%). There should be a high willingness to innovate, and knowledge sharing must be emphasized. Data entry must be straightforward and accessible from any location. The CRM system should not be viewed as a supervisory tool but rather as something that

provides real benefits. Companies should offer introductory training during the system's implementation and regular training thereafter, as the quality of data is vital to the system's success. The advantages of the CRM system should be demonstrated with clear examples, and its importance should be communicated throughout the organization, starting at the management level (linked to sub-categories like "planning" and "leadership"). There must be a commitment to future use of the CRM system, and all users should understand its significance to the company. The system should not impose excessive work and is intended to simplify tasks. Previous CRM approaches have often failed due to lack of acceptance and excessive complexity, as they were seen as tools for control that added to the workload.

From the generalization of interview responses, several key criteria for CRM system acceptance were identified: (1) added value; (2) awareness creation; (3) management commitment and involvement; (4) planning and implementation; and (5) usability.

Added value is essential for CRM system acceptance. Employees must perceive that using the system provides them with additional benefits. Usability implies that CRM systems should be easy, fast, and mobile, supporting users in their daily activities while being logical and intuitive. Awareness of the CRM system's importance must be integrated into the organizational culture, with the system being transparent and aligned with corporate strategy. During the planning and implementation phase, management must make critical decisions about goals, usage, and expectations, and employees should be involved from the beginning. The empirical investigation identified specific factors that influence acceptance, leading to the development of criteria that need to be addressed for the system to be embraced by users.

Quantitative Data Analysis and Results

Based on the interviews that were carried out and analyzed, the following hypotheses were developed:

H1 *There is a connection between the age of a sales representative and the characteristic "customizability" that a CRM system should have.*

H2 *There is a correlation between the age of a sales representative and the "extra work" concern about a CRM system.*

H3 *There is a connection between previous experience in dealing with CRM systems and the concern "technical overload" compared to CRM systems.*

The online questionnaire was sent to 120 individuals, with 101 respondents participating, resulting in an 84.16% response rate. Of those surveyed, 44% were male and 56% female. The age distribution included 33 respondents aged 30 or younger, 28 between 31 and 40, 28 between 41 and 50, and the remainder over 51 years old, with an average age of 37.6 years. In terms of education, four respondents had completed an apprenticeship, while the majority held a Master's or Diploma degree from a university or applied sciences institution. Those with a bachelor's degree or secondary education fell in the middle range.

The questionnaire began by assessing respondents' experience with CRM systems. Given that the CRM system at the company was either newly implemented or still in the implementation phase, only 3% reported having very good experience with it. Meanwhile, 33% rated their experience as good, and 39% had moderate experience.

The second question asked about the importance of various CRM system properties. Respondents identified completeness, reliability, usefulness, and timeliness as the most critical features. The format of the CRM system was the least frequently rated as "very important."

The third question explored the significance of different activities within a CRM system. The most valued activity was faster data and knowledge exchange, followed by more efficient customer service and access to customer data. Support for sales processes and improved opportunity and lead management

were also important, while protection against data loss, misuse, and transparency in customer care were rated as less critical.

Participants were also asked about their concerns regarding CRM system usage. Over 70% indicated that overtime was a significant concern. Restrictions on work freedom and changes in work methods were the next most cited concerns, followed by increased performance pressure and poor usability. Loss of status and excessive technical demands were considered the least concerning. Lastly, when asked about their expected frequency of CRM system use post-implementation, 76% anticipated using it daily, while only 2% expected to use it rarely.

H1 *There is a connection between the age of a sales representative and the characteristic "customizability" that a CRM system should have.*

For hypothesis H1, a correlation test was conducted to examine the relationship between age and CRM system properties. As shown in Table 2, the p-value is 0.001, which is less than 0.05 (indicating significance below the alpha level). This finding demonstrates a connection between a sales employee's age and the importance of the "customizability" property in a CRM system. Therefore, hypothesis H1 is supported.

TABLE 2
CORRELATION TEST BETWEEN AGE AND PROPERTIES IN RELATION TO CRM SYSTEMS

Related variables	Chi square, Pearson Asymptotic significance	Spearman
Age and customizability	0.001 ➔ highly significant*	0.417 ➔ strong correlation

*99% probability that there is a connection
Source: Authors' figure

H2 *There is a correlation between the age of a sales representative and the "extra work" concern about a CRM system.*

The correlation test between experience and concerns related to CRM systems is presented in Table 3. With a p-value of 0.100, which is greater than 0.05 (alpha), the results indicate no significant connection between a sales representative's age and concerns about "extra work" associated with a CRM system. Consequently, based on this study, hypothesis H2 must be rejected.

TABLE 3
CORRELATION TEST BETWEEN AGE AND CONCERNS ABOUT EXTRA WORK

Related variables	Chi square, Pearson Asymptotic significance	Spearman
Age and overtime	0.100 ➔ not significant	−0.289 ➔ no correlation

Source: Authors' figure

H3 *There is a connection between previous experience in dealing with CRM systems and the concern "technical overload" compared to CRM systems.*

The correlation test between experience and concerns about CRM systems is displayed in Table 4. With a p-value of 0.035, which is less than 0.05 (alpha), the results indicate a significant connection between a sales employee's experience with CRM systems and the concern of being “technically overwhelmed” by the system. Therefore, hypothesis H3 can be accepted.

TABLE 4
CORRELATION TEST BETWEEN EXPERIENCE AND CONCERNS

Related variables	**Chi square, Pearson Asymptotic significance**	**Spearman**
Experience and technical overload	0.035 ➔ 65% significant	−0.267 ➔ no correlation

Source: Authors’ figure

CONCLUSIONS

For CRM systems to significantly impact sales and business growth, certain prerequisites (main category 1) must be established, and foreseeable challenges (main category 4) must be anticipated and mitigated. Once these foundational conditions are in place, CRM systems can deliver the expected benefits, including improved efficiency (main category 5) and sales growth (main category 3). Integrative CRM systems combine organizational and technological components that streamline customer interactions. From a corporate perspective, it's crucial that employees embrace these technological innovations. Their acceptance depends on various factors, including perceived value, management involvement, user experience, organizational culture, and how well the system supports specific tasks. An empirical study has identified five key determinants of CRM acceptance: technology-related, management-related, user-related, organization-related, and task-related factors. These elements are essential for ensuring the system’s success and fostering a positive attitude towards its use.

For a CRM system to be accepted and successfully implemented, it must provide tangible value to users, such as facilitating easy data entry and allowing on-the-go access. Defining shared goals between management and employees is critical, as misaligned expectations can limit acceptance. Moreover, organizations need to foster a culture of openness and knowledge sharing. Employee willingness to embrace new technologies is influenced not only by personal traits but also by effective change management and an organizational culture that supports innovation. Successful CRM implementation hinges on management making key decisions regarding system planning and ensuring that employees are involved from the outset. This involvement helps build trust and ownership, while management's continuous engagement and role-model behavior can motivate employees who might initially be resistant to using the system.

Modern CRM systems are no longer confined to a single department. They must function as central, fully integrated tools that all relevant users can access. Sales staff, whether in the front or back office, may harbor concerns about potential technical overload or increased workloads, which could create barriers to acceptance. These concerns, often linked to past experiences with CRM systems, need to be addressed during the implementation phase. It is essential that the CRM system supports the sales employees in their daily tasks by providing accurate data and facilitating their work rather than adding to it. Additionally, personal attitudes, norms, values, and emotions, as well as socio-demographic factors such as age and experience, play a role in how well CRM systems are adopted. For instance, younger employees may expect more customizability in their CRM systems, while concerns about extra work do not necessarily correlate with age. The system's overall success depends heavily on user satisfaction, which is driven by perceived benefits, ease of use, organizational support, and ongoing encouragement from management.

Digital tools in sales continue to evolve, and while this trend is generally welcomed by sales staff, achieving long-term success with CRM systems requires addressing all potential acceptance barriers from the very beginning of the project. Only when these barriers are considered throughout the system's design and implementation can the CRM system lead to better sales performance, improved consultation quality, and competitive differentiation. Based on the findings of the empirical research, management teams planning to implement CRM systems can derive specific recommendations for action. These recommendations emphasize the importance of integrating sales employees' perspectives into the process, as their participation is critical for success. Factors identified in acceptance research, such as the need for clear communication, goal alignment, and the creation of incentive systems, should guide the implementation process.

Change management emerges as a pivotal factor in ensuring the success of CRM systems. Employees must be given opportunities to provide feedback and be involved in the system's development from the start. The quantitative study shows that most sales staff desire a complete, integrated CRM system. To make the system effective, sales representatives need to understand their role in collecting and processing high-quality data. By using incentive systems, companies can increase employee motivation, leading to better customer insights, more effective opportunity and lead management, and valuable key performance indicators. This creates a win-win situation for both management and employees. Given that over 70% of the surveyed sales staff expressed concerns about overtime, it is crucial to communicate that the CRM system is designed to reduce time spent on tasks, not increase it, by speeding up data retrieval and management.

The success of a CRM system also relies on fostering a CRM culture throughout the company, from management to the sales team. The empirical study suggests that the project team responsible for CRM implementation should be composed of dedicated experts who can focus solely on the project without other distractions. It is also important to clearly communicate the benefits of the CRM system to all users and establish incentives to encourage them to populate the system with high-quality data. Change takes time, and as people are generally resistant to altering established work habits, the transition to a new system must be gradual. Implementing a key user concept, where select employees serve as advocates and trainers for the system, can significantly aid in the adjustment process and ensure a smoother integration.

In conclusion, while digital support in sales is rapidly advancing and generally welcomed, the long-term success of CRM systems hinges on carefully managing employee acceptance barriers. For sustainable improvements in sales performance and competitive advantage, CRM systems must be implemented with a comprehensive approach that considers all aspects of employee engagement and technological adaptation. The involvement of sales staff in the early stages of CRM planning, combined with clear communication, proper training, and ongoing management support, are essential for the system’s success.

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