

**Czech University of Life Sciences Prague**  
**Faculty of Economics and Management**  
**Department of Management and Marketing**



## **Bachelor Thesis**

**Introducing of Customer Relationship Management in a  
Packaging Company**

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# **BACHELOR THESIS ASSIGNMENT**

Evgeniia Metlushka

Economics and Management

Thesis title

**Introduction of Customer Relationship Management in a Packaging Company**

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## **Objectives of thesis**

The objective of the thesis is to formulate, based on the research findings, a conceptual proposal of a comprehensive change management strategy to ensure a smooth transition to Customer Relationship Management, whereas the main focus areas when implementing CRM must be identified. The reasons and business drivers of the CRM introduction should be identified and analysed, and the efficiency of an investment in Customer Relationship Management should be determined and discussed.

## **Methodology**

The thesis will consist of two parts. The first should deal with an elementary theoretical overview of knowledge, theories, and research related to Customer Relationship Management, particularly in the context of CRM implementation in companies and their evaluation. The theoretical part of the thesis will be based on the critical review of information gained from the study and a comparison of relevant resources. The fundamental empiric part will focus on a selected company and its business analysis. Data for the empiric part will be gained using appropriate data collection techniques – observation, interviews and questionnaires. Based on the research, the relevant conclusions of the thesis must be drawn.

Recommended structure of the thesis:

1. Introduction – explanation of the topic's importance.
2. Thesis objectives and methodology – the main aim of the thesis will be divided into partial goals based on the knowledge gained from the study of the relevant academic sources. Appropriate data collection and analysis methods will be explained in the thesis methodology.
3. Literature review – a critical review of the existing knowledge, theories, and research related to CRM, particularly in the context of CRM implementation.
4. Specification of the selected organisation – profile of the given company.
5. Practical part – analysis of data gained from the author's research according to the methodology.

6. Evaluation of results and recommendation – formulation of author's original proposal of improvements.
7. Conclusion – review of main results and evaluation of the contribution of the theses.
8. References
9. Appendices

### **The proposed extent of the thesis**

30-40 pages

### **Keywords**

Customer Relationship Management, Change Management, Packaging industry, CRM implementation, Business Processes

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### **Recommended information sources**

- AMMARI, N. B. 2022. Social Customer Relationship Management (Social-CRM) in the Era of Web 4.0. IGI Global. 317 p. ISBN 1799895556
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- WEESE, S, & WAGNER, T 2017, CBAP / CCBA Certified Business Analysis Study Guide, John Wiley & Sons, Incorporated, Somerset. 555 p. ISBN: 9781119248842
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## **Declaration**

I declare that I have worked on my bachelor thesis titled “Introducing of Customer Relationship Management in a Packaging Company” by myself and I have used only the sources mentioned at the end of the thesis. As the author of the bachelor thesis, I declare that the thesis does not break any copyrights.

In Prague on 30.11.2023

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# Introducing of Customer Relationship Management in a Packaging Company

## Abstract

Customer Relationship Management (CRM) is more of a support tool for a company that helps to improve customer relations, communication and understanding of their needs. CRM focuses on the acquisition, satisfaction, and retention of customers. Depending on the primary requests and needs of the company, different CRM applications can be developed enhancing changes in the organization and its mechanisms. The thesis reviews the literature related to Customer Relationship Management and describes some benefits that the system can provide to facilitate daily tasks in carrying out business processes and improve customer service. The purpose of this study is to identify the benefits of CRM system and improvements in the business processes that a CRM system can bring to a packaging company. The main question outlines how CRM system can be designed in order to optimise daily operations and current processes. Through the cross-case analysis of the interviews, the main five benefits were identified, that can drive the improvements in the existing processes of the packaging company. Further, focus areas of CRM implementation were outlined, explaining its draft design particularly to be considered for packaging company.

**Keywords:** Customer Relationship Management, customer, process, implementation, CRM benefits, visit reports, customer account, customer data, market mapping, sales

# Zavedení řízení vztahů se zákazníky pro „Packaging Company“

## Abstrakt

Řízení vztahů se zákazníky (CRM) je spíše podpůrným nástrojem společnosti, který pomáhá zlepšit vztahy se zákazníky, komunikaci a porozumění jejich potřebám. CRM se zaměřuje na získávání, spokojenost a udržení zákazníků. V závislosti na primárních požadavcích a potřebách společnosti mohou být vyvinuty různé aplikace CRM posilující změny v organizaci a její procesy. Práce podává přehled týkající se řízení vztahů se zákazníky a popisuje některé výhody, které může tento systém poskytnout pro usnadnění každodenních úkolů při provádění podnikových procesů a zlepšení služeb zákazníkům. Cílem této práce je identifikovat výhody systému CRM a zlepšení obchodních procesů, které může systém CRM přinést „Packaging Company“. Hlavním cílem je vysvětlit, jak lze systém CRM navrhnout, aby optimalizoval každodenní činnosti a stávající procesy. Prostřednictvím křížové analýzy rozhovorů se zaměstnanci společnosti bylo identifikováno pět hlavních přínosů, které mohou vést ke zlepšení stávajících procesů. Dále byly zváženy hlavní oblasti implementace CRM, které vysvětlují návrh jeho designu pro „Packaging Company“.

**Klíčová slova:** Řízení vztahů se zákazníky, zákazník, proces, implementace CRM, přínosy CRM, přehledy návštěv, zákaznický účet, údaje o zákaznících, mapování trhu, prodej

## Table of Contents

<b>1</b>	<b>Introduction.....</b>	<b>9</b>
<b>2</b>	<b>Main objectives and Methodology .....</b>	<b>10</b>
2.1	Main objectives .....	10
2.2	Methodology.....	10
2.2.1	The research approach.....	11
2.2.2	Research question.....	11
2.2.3	Research context.....	11
2.2.4	Data collection method and instruments.....	12
2.2.5	Data analysis.....	13
<b>3</b>	<b>Literature Review .....</b>	<b>15</b>
3.1	Customer Relationship Management.....	15
3.2	Types of CRM.....	17
3.2.1	Strategic.....	18
3.2.2	Operational .....	20
3.2.3	Analytical .....	21
3.3	CRM Components.....	21
3.3.1	People .....	22
3.3.2	Process.....	23
3.3.3	Technology .....	24
3.4	Benefits of Customer Relationship Management.....	25
<b>4</b>	<b>Findings of the thesis .....</b>	<b>27</b>
4.1	Initial situation of the company in figures.....	27
4.1.1	Sales Development of company .....	28
4.1.2	EBITDA .....	29
4.1.3	Order intake overview .....	30
4.1.4	Sales compared to budget.....	31
4.2	Cross case analysis .....	32
4.3	Benefits of introduction CRM to packaging company.....	36
4.4	Identification of focus areas .....	46
<b>5</b>	<b>Conclusion and recommendations .....</b>	<b>50</b>
5.1	Recommendations .....	54
<b>6</b>	<b>References.....</b>	<b>57</b>
<b>7</b>	<b>List of pictures, tables, graphs and abbreviations .....</b>	<b>61</b>
8.1	List of figures .....	61
8.2	List of tables .....	61
8.3	List of graphs.....	61
<b>8</b>	<b>Appendix.....</b>	<b>62</b>



# 1 Introduction

Customer Relationship Management (CRM) is software that is implemented by many companies for different purposes, as well as for increasing revenues. However, if CRM application is viewed purely from a technological perspective, as a system for generating more profit, there is a high probability that its full potential will not be realized.

Customer Relationship Management is considered as a multi-faceted approach that involves creating and managing customer knowledge aimed at attracting new customers and developing relationships with existing customers. Analysing customer data and their perceptions of the company's products and services is an integral part of CRM, which helps to maximize profits by building a portfolio of customer relationships. CRM has been seen a set of business activities that, apart from technology support, also include processes and strategic directions that serve the organization to improve its overall performance and increase the efficiency of work processes.

Nowadays companies more and more becoming customer oriented, building their sales strategies on improving customer relationships, creating value base for its clients, and providing high quality service. There are also companies, which do not make customers the main base in the chain for generating profits. Those companies concentrating their strategies on being more product oriented, mass production focused or promotional sales.

CRM system is not a global solution to the revenue problem, but it can serve as a support tool for a company that directs its business strategy towards customer values, needs, and preferences. Literature highlights many benefits of CRM application when it comes to its implementation for companies. Mainly those benefits related to efficiency within the company, improvement of business processes and modelling, as well as assessment of customers' needs and customer retention.

Therefore, this bachelor thesis will focus on the defining benefits of CRM application for the packaging company, specifying the impacts on the internal processes within the company and providing recommendation list for CRM focus areas to be introduced.

## **2 Main objectives and Methodology**

### **2.1 Main objectives**

This study focused on the identification of benefits of CRM system and potential impact for packaging company. The main goal of the study is to answer the question of how the introduction of CRM system can be designed for packaging company in order to optimise daily operations and processes within the business unit.

The main objectives are:

- to make literature review about CRM
- to evaluate initial situation of packaging company
- to identify benefits of CRM system and potential impact for packaging company
- to analyse how CRM system can improve daily business operations and processes
- to define which areas of CRM system, need to be considered for packaging company's business scope

### **2.2 Methodology**

The methodology part of the diploma thesis combines the research approach, the data collection method and instruments used to make an analysis of data.

The bachelor thesis covers both theoretical and empirical parts. The theoretical part explores basic concepts and definitions related to the customer relationship management by reviewing secondary sources of information. Secondary sources include academic articles, case studies and research papers.

For the empirical part of the thesis qualitative research is provided, which includes interviews with the sales related team members and analysis of the results. In addition, quantitative research is focusing on evaluating initial situation in the company and defining prerequisites for the introduction of the CRM system. The approach of conducting empirical research is described in detail in the below section.

### **2.2.1 The research approach**

Quantitative research aims to present what is current business development of the company, situation in the market in which company is operating and defining preconditions for the implementation of CRM system.

Empirical qualitative research aims to identify the benefits of implementing a CRM system and its impact for packaging company by collecting opinions and information from employees and considering objective indicators. The results obtained from the study provide a detailed picture of the benefits of CRM implementation to improve internal business processes in packaging company.

### **2.2.2 Research question**

The research question is: what benefits and improvements of business processes CRM system can bring to the packaging company?

### **2.2.3 Research context**

The identification of the advantages of CRM system and improvements of the business processes for packaging company is performed based on the analysis of business cases and experiences of sales team members.

In order to understand the initial situation of the company, taking into account the current challenges of the market, the financial analysis of company was made. This analysis was based on the internal company sources such as sales reports, profitability reports, order intake analysis, outlook data and sales volume development tools.

In order to highlight the benefits of implementing the CRM system for packaging company, an empirical method with a qualitative focus was used, which included conducting interviews with employees of the company where the CRM system has not been implemented. Face-to-face interviews and Microsoft Teams interviews were conducted.

The interviewees were selected based on their roles and responsibilities in the department to understand the existing challenges and potential advantages associated with the improvement of the business processes and possible implementation of a CRM system in the company. Their

views and experiences related to sales processes and the difficulties arising from the lack of technical support in the form of a CRM system were studied.

*Table 1. Overview of sales team*

	<b>1<sup>st</sup> team member</b>	<b>2<sup>nd</sup> team member</b>	<b>3<sup>rd</sup> team member</b>	<b>4<sup>th</sup> team member</b>	<b>5<sup>th</sup> team member</b>
<b>Organization</b>	Packaging Company	Packaging Company	Packaging Company	Packaging Company	Packaging Company
<b>Department</b>	Sales	Sales	Sales	Sales	Business Development
<b>Position/Role</b>	International Key Account Manager	European Key Account Manager	European Key Account Manager	Sales Support	Business Development Manager
<b>Level of experience</b>	10 years	5 years	6 years	5 years	12 years
<b>How long employed in company</b>	5 years	4 years	3 years	2 years	2 years

#### **2.2.4 Data collection method and instruments**

Quantitative analysis was selected to understand initial financial situation of the company, by gathering sales related data from internal reporting tools. Sales development, EBITDA, Order intake parameters will be shown on the graphs. To have better overview on the market development in relation to the specific industry company is operating in; the additional external source such as marketing intelligence studies will be reviewed.

Semi-structured interviews were selected as the data collection technique to gain insights into the necessity of implementing the CRM system, highlighting its benefits, and analysing potential impact on the company's processes.

As the study was based on the participants' opinions and understanding of the problems described, a semi-structured interview method was used for the interviews. The semi-structured format is characterised by its data collection procedure, which is important for the quality of the research as well as for its results. By using a semi-structured format, questions are identified and formulated before the interview and should cover the main research topics. One of the main

advantages of this method is that it allows the interviewer to improvise and construct questions based on participants' previous responses (Kallio, Pietila, & Johnson , 2016).

The interview with all participants took between 30 - 60 minutes and were held over online meeting via Microsoft Office Teams, Face Time app and Zoom. The interviews included open-ended and opinion-based questions, and a topic guide was employed to prevent the interviews from deviating from the main topic.

### **2.2.5 Data analysis**

Data analysis consist of two main approaches: one focuses on quantitative review of market and initial business situation of how company is operating over the recent years, what is overall market development within the industry and current challenges. Second approach focuses on qualitative information gathered during the interviews and was performed in two phases.

#### ***Phase 1: Cross-case analysis***

First phase includes cross-case analysis that provides an opportunity to correctly interpret the large amount of information collected during the interviews. Cross-case analysis involves comparing and analysing of the respondents' answers in order to identify similarities and differences between them. The main purpose of the study is to provide a broader conclusion for the case study. This analysis enables a better understanding of how distinct or comparable employees' perceptions of improvements of the company's processes, and benefits of CRM (Yin, 2009). For visualization purposes, the cross- case analysis table is built to summarize the findings in the bullet points.

#### ***Phase 2: Identification of benefits and improvements of CRM***

After analysing the data and drawing outcomes form the first phase, the second phase refers to the identification of CRM benefits and potential improvement of the company's processes. By introducing CRM to packaging company, which internal process can be improved and what are additional benefits it can generate not only for sales department, but also for other teams.

These benefits and reasons for improving company processes through CRM will be identified by comparing and identifying patterns between interviewees; clustering of information; by contrasting the statements in the interviews of each of the participants.

Taking into account the findings from the two phase's analysis, the recommendation list of CRM areas will be provided. The listed CRM areas will be suggested basis base that packaging company need to focus on by introducing CRM tool.

### **3 Literature Review**

The purpose of this thesis is primarily to understand the importance of customer relationship management, as well as to introduce readers to the technologies and application of the system in the company.

Customers are the most crucial component of the company's work. Companies cannot exist without clients. With the growth of the customer base and the development of technological capabilities, it has become easier to get information about the expectations, preferences, and behavior of customers. Thus, *“in order to thrive, a firm must focus in deliberately increasing the value of the customer base”* (Peppers & Rogers, 2004). An important point is that the introduction of a CRM system into the company greatly simplifies the work and communication of different departments. Maintaining and building good relationships with customers is not only the task of the marketing team, the whole company and every department is involved in this action. Commercial and non-commercial, small or large and public or private companies are also no exception.

This chapter presents the meaning, value, and use of CRM systems in a company, in particular for obtaining information from customers. Additionally, the different types of CRM, their elements, models, and the obvious benefits of using the system are discussed, as well as how it makes it easier to complete daily tasks.

#### **3.1 Customer Relationship Management**

Customer relationship management (CRM) is primarily a software for company, but also a business strategy that is customer oriented. By combining sales, marketing and customer service, CRM thereby creates and increases value for the company and its customers (Chalmeta, 2005). First of all, the very meaning of introducing this system in the company is to understand the needs of the client.

At the moment, there is no one ideal definition of a CRM system. Regarding its meaning, purposes, and characteristics, the term is quite adaptable. The CRM system has a unique

purpose and use for every business, just as every organisation has unique business strategies, procedures, and objectives. (Sakunthala, 2022)

The roots of customer relationship management date back to the early 1970s, a time when a company was just beginning to understand and use databases to store information and data about their customers. The emergence of company software with functions such as contract management - which emerged in the late 1980s and early 1990s - was extremely effective for managing information. Companies began to focus on applications, tools, and methods of knowledge management. The goal was to develop means of innovation and improvement by increasing the collective power of knowledge in companies. Therefore, since the 1990s one of the significant things in the marketing world has happened - the evolution of relationship marketing, which has come about because the focus of many companies has shifted from attracting new customers to maintaining relationships and retaining existing ones. (Chattananon & Trimetsoontorn, 2009)

When the concept of CRM is compared across different eras, both similarities and differences are revealed.

**Table 2. Definition of CRM**

Definition	Year	Source
<i>“CRM is the process that addresses all aspects of identifying customers, creating customer knowledge, building customer relationships, and shaping their perceptions of the organization and its products.”</i>	1999	Rajendra Kumar Srivastava, Tasadduq A. Shervani, Liam Fahey (1999)
CRM deals with integrating and analysing customer data. In this way, the company understands customer requirements and builds a portfolio of customer relationships, thereby maximising profits. Effective implementation of the knowledge management process generates the necessary market information.	2004	Alex R Zablah, Danny N Bellenger, Wesley J Johnston (2004)
The most information about CRM in the literature is provided by software vendors, where the technical point of view is addressed more. <i>“The thrust on CRM has been viewed as a business necessity within organizations”</i> .	2004	Susan Hart, Gillian Hogg, Madhumita Banerjee (2004)



CRM is a set of business activities that is supported by technology, processes, and follows a strategic direction. Thus, Customer Relationship Management serves to improve business performance in the area of customer management	2008	Keith A. Richards, Eli Jones (2008)
<i>“... customer relationship management (CRM) has become the sine qua non for many organizations as a means of enhancing performance.”</i>	2012	Molan Kim, Jeong Eun Park, Alan J. Dubinsky, Seoil Chaib (2012)
To represent CRM in a B2B company – it is software that stores publicly available information for all employees in one place. It makes it possible to receive and update in real-time information about the company's suppliers, developments, and other information from third parties that are interested in concluding contracts.	2019	José Ramón Saura, Pedro Palos-Sanchez, Alicia Blanco-González (2019)

If it is a large company, the opportunity is considered not only to attract customers, but also to develop in other markets and areas. This can be achieved by having knowledge of the needs of the Klenites, their desires, and especially what is extremely unpleasant to them. Meanwhile, using data management, the company uses this information and distributes it for its own purposes. It is this knowledge that is most important for the organization (Rowley, 2002). Relationship management is recognized as one of the foundations for achieving the success of the organization, its growth and development in the field of mutual relations between clients and the corporation. Building a relationship of mutual trust with customers represents a new and special stage in the management of mutual relations with customers.

### 3.2 Types of CRM

For companies that deal with information technology CRM is more of a software application. In this case, CRM is defined as a technology that supports marketing and sales functions as well as enterprise service. On the other hand, there is a managerial view of CRM, which is an approach for creating and maintaining successful customer relationships. Looking at the definition in this way - technology may not be involved. However, it is difficult to conceive of a large firm communicating with a large number of customers, clients, and suppliers on a daily basis without the use of cutting-edge technology and processes. Considering the quantity of

activities conducted across different channels, it would be difficult for a firm to function using solely paper media or without utilizing information technologies to their utmost degree.

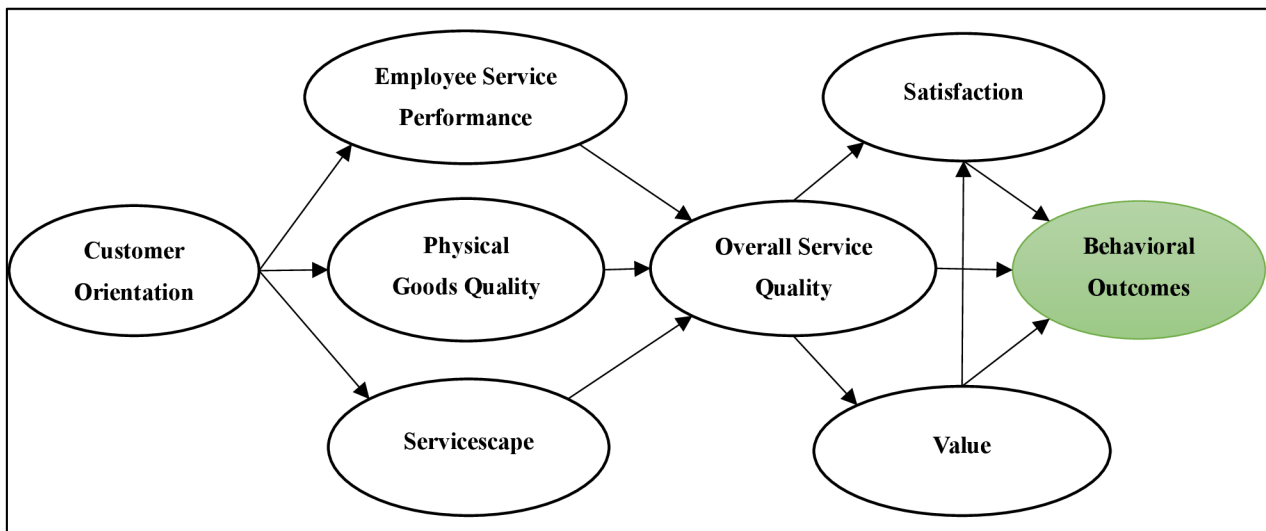
Maclan and Battle divide CRM into three main forms, thus resolving the dispute between two schools of thought: managerial and technological (2015).

### 3.2.1 Strategic

This type of CRM is a core strategy where the focus is on attracting and retaining profitable customers. Changing the culture of the business is one of the necessary factors for a company to be customer centric. Corporate culture is one of the most important indicators of a company's willingness to work for specific customers, focusing on their needs and desires. Such indicators may include the behaviour of the management; the provision of values and morals that surpass the competition, and the stories that are created within the company. These days, it is hard to find a company that claims not to be customer centric.

Brady and Cronin provide an explorable relationship between customer and company (2001).

Figure 1. The Research Model



The result of the research is that organisations that have a higher level of customer centricity – “...reap multiple benefits”. First of all, customer orientation has a positive impact on the perception of the quality of the product and services provided. Moreover, satisfaction and value and behavioural outcomes are increased. For the organisation, this means direct and indirect

benefits as customer orientation influences the perception of quality and satisfaction (Brady & Cronin, 2001).

The management of insightful information is directly related to obtaining important and specific information about customers. Thus, this fact underlines the importance of CRM, as it is the most effective competitive advantage, which can help in attracting new customers and at the same time retain and interest existing ones. One of the fundamental things of business survival is attracting and retaining customers. However, according to research by Rosenberg and Czepiel, the costs of acquiring new customers is much higher than the cost of building relationships with existing customers (1984). Additionally, maintaining relationships with customers has a direct impact on profits; as a result, many businesses place a high priority on this aspect of their business strategies (Chang, 2007).

However, it is worth noting that there are other areas of business besides 'customer'. According to Kotler (2000), apart from customer centricity, there are also companies and their strategies that are aimed at:

- Product – Product-oriented companies largely disregard the customer's opinion, relying solely on assumptions about their actions and desires.
- Mass production – An enterprise seeking to provide customers with a product or service at a lower and more attractive price can be described as production-oriented. Such companies try to reduce operational costs, rarely enter the market with new and provocative ideas, and focus their attention on customers who are attracted by good quality products at an affordable price for a large number of people. Customer opinion does not play as important a role in decision-making, as it does in companies that are product oriented.
- Promotional sales – "*Investing in marketing, sales, and public relations will attract customers and will be the main indicator in terms of selling a product or service,*" is how Maklan and Buttle explain the strategy of sales-oriented companies (2015). This strategy typically succeeds in rapidly expanding markets, resulting in a larger market share and, ultimately, economies of scale. Sales orientation and production orientation

are often linked. A company first produces a product 'for everyone' and then actively starts to promote and sell the product afterwards.

### **3.2.2 Operational**

The emphasis of operational CRM is on process improvement, automation, re-engineering, and usability simplification. Operational CRM includes data collection, processing, complete transaction control, and workflow management for the different departments that need to directly cooperate with each other and share information (Al-Homery, Asharai, & Ahmad, 2019).

Maklan and Buttle highlight some of the core applications of operational CRM, which allow for easier communication with customers and aim to improve the functionality of certain areas (service and support, marketing and sales) (2015):

- Marketing automation
- Sales-force automation
- Service Automation

*Marketing automation* enables marketers to collect and use customer data to develop and evaluate communications and offers and reproduce them in the future. It enables predictive modelling and automation of the processes involved in customer engagement. In this way, the company can make relevant offers to customers based on the information collected about their behaviour through the use of data collection platforms such as the company's websites.

*Sales-force automation* improves and standardizes the entire sales process. Using the company's software, it is possible to monitor and control the process from the beginning (receipt of the order) to the end (completion). Another advantage is the contact management system, which makes the work of the employees much easier. Users gain access to a more convenient way of communicating with customers as the contact management application has features that reduce the time spent on daily tasks:

- Personal calendar for the salesperson
- Automatic customer dialling and automatic emails

- Storage of personal customer information (transactions, interaction history, social media profiles, scheduled activities)
- Tracking of leads

*Service automation* is not the least important to a company. It enables the use of technology to conduct transactions for the provision of goods and services through various customer support services, such as call centres, online contact, or face-to-face meetings. This allows for the efficient and rapid processing of data from various communication channels, which is directly related to the goal of service automation – increasing customer satisfaction and retention.

According to Buttle (2008), operational CRM automates business processes and facilitates the work of various departments, resulting in CRM being economically beneficial to the company when all interactions and procedures in the company are strengthened through the use of the organization's internal processes.

### **3.2.3 Analytical**

Organizations use analytical CRM as a process to turn customer-related data into useful knowledge for either strategic or tactical goals (Dyché, 2001). Analytical CRM is the process by which organisations transform customer-related data into actionable information for strategic or tactical purposes. Analytical CRM is currently one of the most important things to consider when implementing systems, as it gives the company a complete understanding of what approaches and solutions are worth applying to certain groups of customers and clients.

Operational CRM is closely related to the analytical type. Only when these two types of CRM are integrated can a company achieve full efficiency and effectiveness. By understanding customer values, the company changes its strategies and makes decisions.

## **3.3 CRM Components**

Definition Customer Relationship Management (CRM) refers to the process that combines people, mechanisms, and technology to better understand a company's customers. It is important to clarify and accept that CRM cannot be directed in one direction and have one factor that defines everything. First and foremost, it is the combinations that work together and

produces the results the company expects from them. However, to achieve the goal, it is worth considering factors that are most often forgotten in companies where a CRM system is being implemented. A company may not be ready for a system because it will definitely lead to huge changes - from review to complete changes in business processes, thereby reengineering them. To fully comprehend how and why CRM works and generates results - rather than focusing solely on the technical perspective, it is preferable to examine the system's components in order to avoid overlooking the complete spectrum of capabilities. The CRM components are inextricably intertwined and mutually dependent. If just one component of the mechanism works or if one of the parts is defective, the results of the efforts will be limited (Chen & Popovich, 2003).

### **3.3.1 People**

People will unquestionably be one of the main factors. The company is its employees, who communicate with one another and use the CRM system directly. Changes to business processes will only be effective if the individuals performing the actions to achieve CRM objectives are also effective. CRM brings decisive changes, and everyone should be prepared for them. The new processes that replace the old ones need to be understood and evaluated by the entire organization. The successful implementation of the new business processes will depend on changes within the organization, which will directly depend on people understanding exactly what is to be changed and what the purpose of the change is. Receiving input from consumers regarding the product, services, their expectations, and the capabilities of rivals and then evaluating the company's progress towards the change leads to a profound knowledge of the need for the change. Last but not least is understanding the process change, what it will result in, and what impediments and challenges the firm may encounter while attempting to change.

Defining CRM functionality is an implemented strategy of several functions that include sales, marketing, and customer service. A system that cannot and cannot work only in one direction or department, and directly depends on coordinated and planned actions throughout the company (Kalakota & Robinson, 2000). It is important to remember that business re-engineering and the introduction of a new system may result in arguments and misunderstandings between personnel and functional departments. This situation necessitates the direct involvement of top management and total control over the situation throughout the

whole CRM system adoption process, which will eventually result in changes to the corporate culture. If the organization does not have a customer-centric culture orientation, the installation of CRM will not bring about significant improvements and benefits.

According to Daft (2008), a learning organisation is one in which everyone is engaged in problem identification, allowing the organisation to continuously experiment, develop, and expand its capability. To avoid squandering time, customers, and money, management should organize continuing training and education for the entire organization in order to prevent employees from misinterpreting the reasons for changes and reengineering business processes (Chen & Popovich, 2003).

### **3.3.2 Process**

The availability and variety of goods and services on the market has led many companies to change tactics from mass marketing to targeted marketing. Gradually, the effectiveness of mass marketing methods, which aim to sell everything that has been produced, is considerably reduced when the customer can choose from the numerous products provided, which will be more attractive in many ways. These businesses are product-oriented, and usually the voice of the customer is not considered or is not the main indicator for advertising, sales, or service decisions. Maklan and Buttle cite the example of Apple as one of the most exemplary and successful enterprises using the methodology of mass marketing, where the management assumes the desires and preferences of the customer (2015). However, successful examples of this type of business are extremely rare. A product-focused business is more likely to charge exorbitant prices for unaffordable goods.

At the same time, segmentation helps to redirect the attention of the enterprise to the needs of the customer and subsequently change the marketing efforts and production of the product. Companies that use the method of target marketing consider that the opinion of the customer is the most important thing in making important decisions. Companies that reach this stage will profit from a marketing-manufacturing interface, which will provide them with the flexibility to respond quickly and effectively to changing customer needs. By collecting, distributing, and analysing information on customers and competitors, it develops Nowadays, information technology (IT) is one of the necessary tools for changing company processes, allowing to

rethink the work and improve it for the benefit of the company and its customers. With CRM systems, it is possible to create new methods of communication with customers and suppliers and improve internal communication in the company between departments. The system offers functions such as gathering and analysing data about customers, their wishes, and their behaviours in order to understand flaws from past experiences and improve them in the future. This way, the required information is interpreted and gives insight into customer behavior, which allows the company to respond effectively and urgently by providing products and services to targeted customers. CRM technology is necessary for companies when they are storing and analysing large amounts of data.

### **3.3.3 Technology**

Nowadays, information technology (IT) is one of the necessary tools for changing company processes, allowing to rethink the work and improve it for the benefit of the company and its customers. With CRM systems, it is possible to create new methods of communication with customers and suppliers and improve internal communication in the company between departments. The system offers functions such as gathering and analysing data about customers, their wishes, and their behaviours in order to understand flaws from past experiences and improve them in the future. This way, the required information is interpreted and gives insight into customer behavior, which allows the company to respond effectively and urgently by providing products and services to targeted customers. CRM technology is necessary for companies when they are storing and analysing large amounts of data.

However, there is a misconception that the implementation of CRM is only an extension of existing information technology in a company. Initially, IT is extremely important in the implementation process, but there are also two other important components of CRM: people and processes. Maklan and Buttle claim that people implement and design the processes, and IT will support them. A good system cannot replace or compensate for ineffective processes and people who fail to do their jobs (2015).

In some cases, where the goal is mainly to improve relationships and customer retention, technology is not the most important factor. In this case, a process aimed at changing employee



attitudes through training and coaching on how to behave and maintain customer relations plays a major role.

### **3.4 Benefits of Customer Relationship Management**

A successful implementation of a CRM tool depends on the company, its industry, goals, and a full understanding of the features that need to be emphasised when selecting and configuring a system. First and foremost, a company must understand whether it is working on efficiency and business process modelling, assessing customers and their needs - thus opting for an analytical CRM.

To achieve sales effectiveness and customer retention, it is important to understand the information that is provided to the company. Without a proper understanding of how to use the available data along with the right processes, it will not be possible to achieve the desired performance (Hazboun, 2006).

One of advantages of CRM was presented by International Data Consultancy, are related to the analytical and operational processes. Analytical processes refer to the existing data in the company's warehouse and the modelling of the data. Operational processes are adaptation of previously created modules and monitoring of results. Therefore, in order to achieve the best results and maximize the impact of CRM, it is better not to be limited to one area, choosing between analytics and operations.

Another benefit that Kim and Lee (2020) highlight in their study is related to the fact when CRM focuses on customer acquisition and retention. On the one hand, customer acquisition includes activities such as: identifying potential customers and implementing activities to create loyalty. On the other hand, customer retention focusses on core activities. In order to attract customers, it is worthwhile to initially focus on customer-oriented services.

According to a study conducted by Bain & Company (2017), a 5% increase in customer retention can result in a 25% to 95% increase in profits. Customers who are satisfied will undoubtedly return to the business that has met their preferences to the higher extend. CRM is a direct link to customer satisfaction, which will then become a regular customer. It will keep

track of all existing customer preferences and thereby tailor marketing efforts and strategies to those preferences, thereby gaining new customers by recommending existing ones. According to Swift (2001) – CRM delivers benefits, such as reduced cost of customer acquisition, potential increase in sales and profitability, and higher customer loyalty.

The introduction of an CRM system allows company to build the work plan in a way as to focus marketing, business processes in order to focus all attention on customers based on their desires and needs. The appearance of such a system in the company is not the solution to all problems, but it greatly simplifies the work associated with clients' interactions, making their actions manageable and predictable.

Company managers should understand that when implementing the system, they will have to resort to restructuring and revising many business processes and the work of employees in general, simply improving the already established processes in the company is not enough. The usefulness of CRM depends entirely on how the company will use the provided means to obtain information and personal data about customers. In this case, the company will need multiple changes including employee training and their remuneration. In particular, if a company plans to maintain an edge in ever evolving and competitive markets, it needs to be resilient and adapt to change. Laudon K. and Laudon J. believe that a company that decides to implement a CRM system should focus on the customer rather than the product, this would change the focus of all business processes (2004). Such solutions entail changes in the routine work of many departments, especially sales and marketing, which will be forced to cooperate with the new technology - the information system. Organisational learning is one of the most important factors in the effective implementation of CRM.

In selected industries, Adireddy Sakunthala cites following CRM benefits: customer retention rate, increased customer satisfaction, sales of existing customers, accuracy, and speed of response, reduce service costs and selling costs, and new customer opportunities. In addition, CRM implementation provides other improvements like significant increase in sales and cost reduction, transparency in communication management and increase in customer trust (Sakunthala, 2022).

## **4 Findings of the thesis**

This chapter presents the findings identified during the research and presents the data in four parts. The first part includes an overview of the company's initial financial situation. It provides information about the company and an insight into market developments to provide a better understanding of the industry in which the company operates. The second part is a summary of the results obtained from the interviews. The data is provided in a table for proper interpretation of the data. The third part provides the benefits of CRM in "Packaging Company" identified through cross-case analysis. The last part describes focus areas that should be considered by the packaging company during CRM implementation.

### **4.1 Initial situation of the company in figures**

This section provides information about the background of the analysed Packaging company, its performance, what are prerequisites and initial situation, as well as describes facts and figures.

The Packaging company is a major player in Cardboard, Paper and Folding Carton manufacturing with a worldwide footprint. Founded in Austria, this family business entered the stock exchange in 1994 and started a strong expansion to western and eastern Europe. Since 2004 company started to operate worldwide by acquiring operations in Russia, Middle East, Latin Amerika, Far East (Vietnam) and acquired several packaging companies allowing to expand the product portfolio. This was as well a period of steady growth which allowed the company to more than double its sales from ca. 1,2 bn EUR to almost 2,8 bn EUR till 2019. (Sales internal data from ERP system, 2019)

The main business units produce packaging solutions for companies from the following industries: Food & Specialities, Pharma & Healthcare, Cigarettes and Beauty & Personal Care. The Packaging company has been successful in the past, but the world has changed significantly in the last three years and the company had to face external changes, major disruptions, and challenges, starting with COVID outbreak in China in 2019, Russian invasion to Ukraine in 2022 and strong inflation going forward. (Annual Report, 2019-2022)

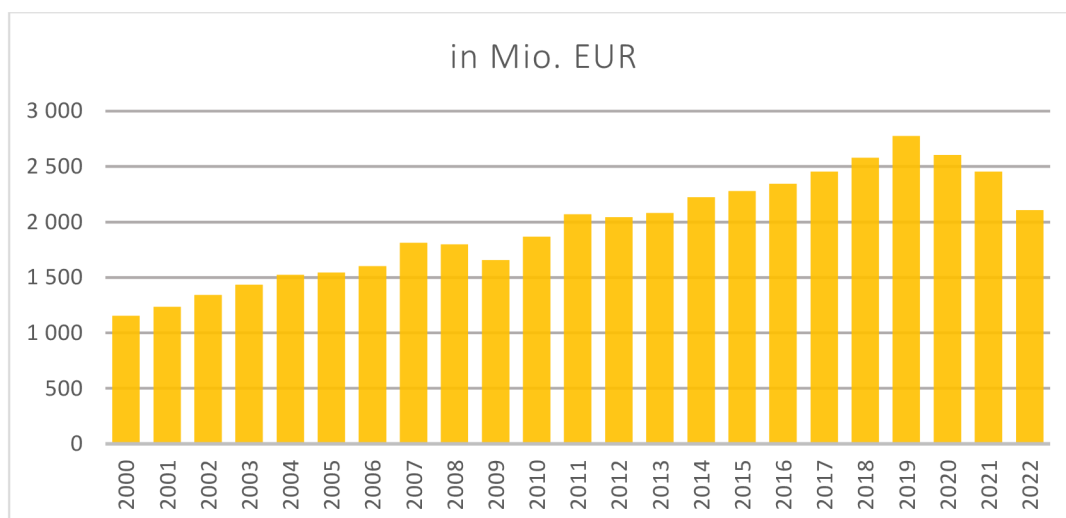
As a result of the above, the market environment changed drastically after the record year 2019. The reduction of high inventories in the supply chain and the inflation-related change in purchasing behaviour for consumer goods and declining consumer purchasing power led to a sharp decline in the European cardboard market. This historically unusual change was also accelerated by the loss of the Russian market as well as weak and competitive overseas markets. On the other side, some input prices decreased due to the lower demand (for e.g., recovered paper) so that more pressure was build up on the sales prices. As a result, there was substantial decline in sales volumes and results compared to the last year's record levels.

In terms of outlook, no signs of improvement due to weak economy, fears of recession in the Eurozone and continued declining private consumption can be forecasted. The Packaging company sees reduced orders mainly in the food sector due to lower consumer demand as a result of inflation, losing customers due to delivery performance and sales prices and shift from branded products to private labels often using cheaper plastic packaging due to cost reasons. (Annual report, 2022), (HY results, 2023)

All of the above led to the below development of some of the major sales KPIs.

#### 4.1.1 Sales Development of company

*Graph 1. Sales Development 2000 - 2022*



Source: Sales data imports from internal system ERP from 2000 till 2022

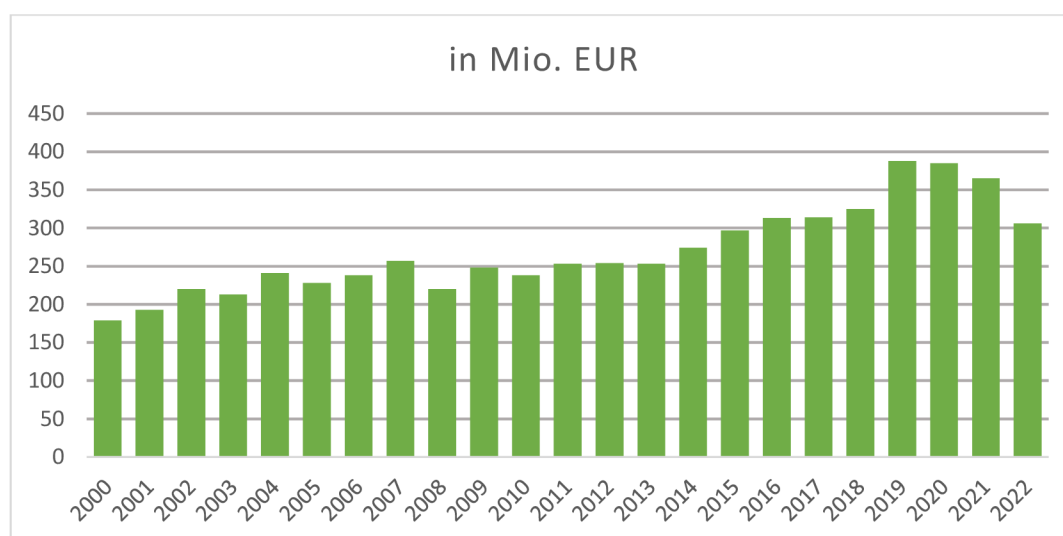
The graph above shows the positive development of the sales of the Packaging company in the period from 2000 to 2019, as well as the effects of the negative trends in 2020 to 2022. The data is presented in the form of a line chart, which gives an idea of the dynamics of growth and decline of the company's sales over a period of 22 years.

The graph represents the data that is arranged on the X and Y axis. The horizontal X axis represents time (years 2000 to 2023) to provide a chronological overview of the data. The vertical Y axis shows the company's sales revenue in millions of Euros.

A relatively steady upward trend can be observed till 2019 with stable and mostly increasing sales revenue. Starting 2019 there is a significant decline in sales. The performance for 2022 is 14% lower than the previous year, however, comparing with the peak in 2019 the sales are down by about 24%.

#### 4.1.2 EBITDA

*Graph 2. EBITDA Development 2000-2022*



Source: Annual report of packaging company from 2000 till 2022

The graph 2 illustrates how the Packaging Company's EBITDA develops over 22 years, starting from 2000 and ending in 2022. EBITDA is a measure of the company's operating profitability excluding interest, taxes, depreciation and amortisation.

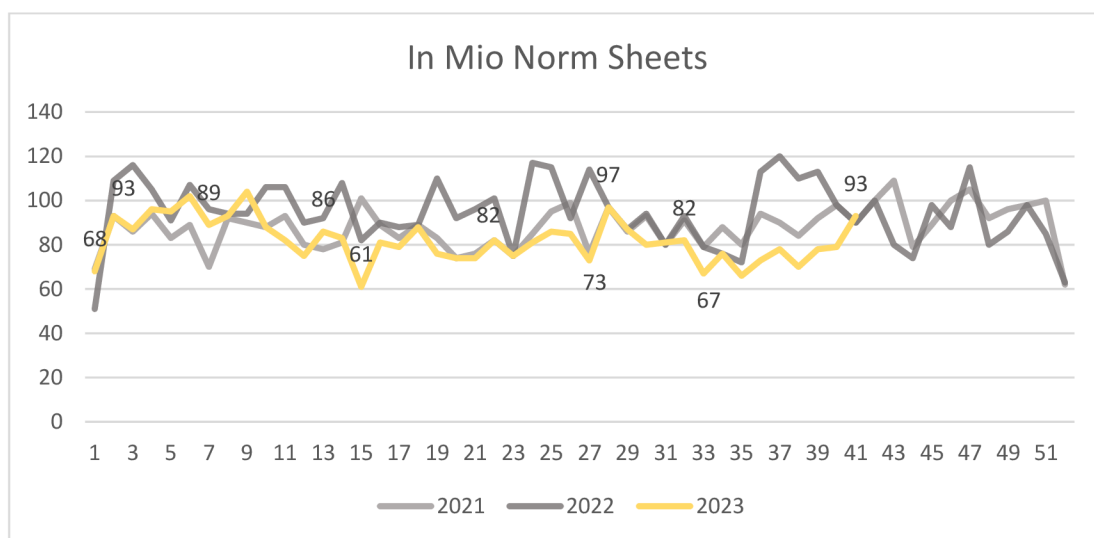
This graph is linear with a horizontal X-axis, which represents the years from 2000 to 2022; and a vertical Y-axis, which shows EBITDA in millions of euros. Till approximately 2013 the trend is slightly fluctuating, which might be the result of the company’s expansion, investments and changing cost structure. From 2014 company shows significant and steady growth and a positive trend in operating profitability.

The previously mentioned trends and developments lead from 2019 also to a declining operating profitability of the company.

### 4.1.3 Order intake overview

The graph below represents the Packaging company’s order intake rates from 2021 to 2023.

**Graph 3. Order intake 2021-2023**



Source: Sales data imports from internal system ERP from 2021 till 2023

During each year there are fluctuations with peaks and downturns in the number of incoming orders. There is a trend of similar development throughout the years 2021 and 2022, while 2023 indicates changes in the company’s order book.

Peak Weeks:

- In 2021, week 43 had the highest numbers for the year, which was 109 Mio Norm Sheets.

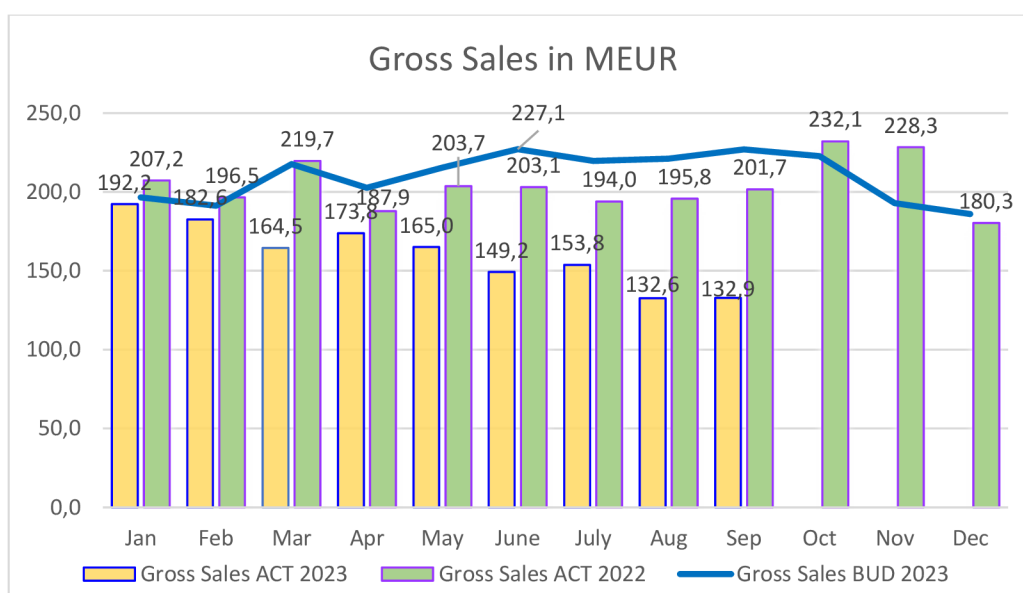
- In 2022, the highest value was recorded at week 37 and was 120 Mio Norm Sheets
- In 2023, 104 Mio Norm Sheets in the week 9 is considered the highest number.

Comparing the order volumes for each year, while 2021 and 2022 were relatively on similar levels, the company’s orders decreased in 2023. While the company’s orders reached their peak in week 41 at 3 948 Mio Norm Sheets, which is a 10% increase compared to 2021, the order intake in the same period in 2023 amounted to 3 363 Mio norm sheets, which is 5% less than in 2021 and 14% less than in 2022.

#### 4.1.4 Sales compared to budget

When comparing to the budgeted figures, the declining trend in sales over the past 2 years can be seen in the following graph. The downward trend continued also throughout 2023 and was significantly below the budgeted figures. This might be due to too optimistic budgeting for 2023 based on the higher volumes achieved in the past and relatively steady order book in 2021 and 2022, however, confirms the danger of too optimistic outlook in the current economic environment and calls for action.

**Graph 4. Packaging Division 2022 - 2023**



Source: Turnover report 2022-2023 from ERP

Based on the above analyses and taking into account the development of the market situations over the past period, it can be concluded that the packaging company is entering a challenging path. There is a need of actions directed towards defending existing business, acquiring new customers, as well being competitive in tenders by existing ones, searching new opportunities for growth, improving commercial excellence, and optimizing the current existing process.

In the following chapters the development and possible way forward are analysed based on the data gathered during the interviews and its cross-case investigation. As completion phase of the cross-case analysis the specified benefits of the CRM were identified and potential impact on the packaging company is described.

## 4.2 Cross case analysis

The cross-case analysis table summarizes the findings gathered during the five interviews with company’s employees. The first column represents the topic related to the field of which questions were raised, the other columns represent the participant identification number accordingly.

*Table 3. Cross-case analysis of interviews*

	Sales 1	Sales 2	Sales 3	Sales 4	Sales 5
<b>Advantages and Disadvantages of CRM</b>	«+»: <ul style="list-style-type: none"> <li>- easy access to data</li> <li>- centralized information</li> <li>- transparency</li> <li>- sharing knowledge</li> </ul> «-»: <ul style="list-style-type: none"> <li>- employee adoption</li> <li>-change in mindset</li> <li>- administrative work</li> </ul>	«+»: <ul style="list-style-type: none"> <li>- comprehensive view of interactions</li> <li>- understanding customer needs and preferences</li> <li>- statistics, approval mechanism in one place</li> </ul> «-»: <ul style="list-style-type: none"> <li>- Extra administration work</li> </ul>	«+»: <ul style="list-style-type: none"> <li>- separate &amp; centralise information</li> <li>- easy access to data</li> <li>- displaying interactions</li> </ul> «-»: <ul style="list-style-type: none"> <li>- impact on all work of the company</li> <li>- change of corporate culture</li> <li>- adaptation of CRM</li> </ul>	«+»: <ul style="list-style-type: none"> <li>- proper accounting</li> <li>- maintain &amp; improve relationship and service</li> <li>- increase sales</li> <li>- customer’s information and interactions are quickly accessible</li> </ul> «-»: <ul style="list-style-type: none"> <li>- administration efforts</li> </ul>	«+»: <ul style="list-style-type: none"> <li>- all information concerning the client <b>in one place</b></li> <li>- tailored to the company's specific industry and needs</li> </ul> «-»:
<b>Customer Information Storage</b>	<ul style="list-style-type: none"> <li>- personal drive on PC</li> <li>- OneDrive</li> <li>- emails</li> </ul>	<ul style="list-style-type: none"> <li>- Outlook</li> <li>- mobile phones contact</li> <li>- emails</li> </ul>	<ul style="list-style-type: none"> <li>- OneDrive</li> <li>- emails</li> </ul>	<ul style="list-style-type: none"> <li>- emails</li> <li>- messages</li> <li>- files (phone or drive)</li> </ul>	<ul style="list-style-type: none"> <li>- part of „account strategy plan</li> <li>“document</li> <li>- OneNote</li> </ul>



		- share folders		- share folders	- Excel - emails - word files
<b>Accessible Customer Database</b>	Customer Master data in EPR: - order information - various reports	- SAP ERP - BI reports	- SAP ERP	- drive (contact list, information) - BI reports	- GRE system (invoice report) - personal note
<b>Customer Visit Reports</b>	- not available  alternative: - reports in emails with information - time consumption	- not available - not standardised  alternative: -email with summary of meeting - time consumption -missing customer's data	- not standardised - reports in emails with summary of meeting	- word file (filled out after the visit, meeting/online meeting) - time consumption = 30-90 min	-Not available  alternative: -email with summary of meeting -free form -time consumption = 1-2 hours
<b>Time management for daily tasks</b>	For listed business processes ≈ 4,6 hours	For listed business processes ≈ 4,5 hours	For listed business processes ≈ 5,2 hours	For listed business processes ≈ 5,8 hours	For listed business processes ≈ 4,8 hours
<b>Sales Process Optimizations</b>	- standardization of information - optimization of repetitive processes	- sales reports - customer account information - contact information	- optimization of regular action - keep all customer & interaction information in one place	- synchronised online sales information - assign tasks - tag people - have access to documents	- visits reports - overview for customer account - sales report - common enquiry tracking tool - competitor section - technical capabilities per each plant - Machine Park overview - assign tasks to another employee - market mapping
<b>Digitalization and Automatization</b>	- data collection - report generation - linked information to particular customer - leads' information in one place - data entry - data storage	- link customer accounts to ERP - synchronization with Outlook - allow other departments to access customer data - data from the emails is sorted	-automation of lead tracking -follow-up reminders - email, phone, social media marketing - create personalised profiles of customers	- report simplification - improve note-taking efficiency - create a central repository of information - automation of emails	- assigning tasks - customer's data in one place - automation of sales reports (combining customer information and ERP system)

			<ul style="list-style-type: none"> <li>- availability of reports (order intake, turnover)</li> <li>- board consumption automatization</li> </ul>	<ul style="list-style-type: none"> <li>- manage contact data collection and storage</li> </ul>	
<b>Limitations in daily business</b>	<ul style="list-style-type: none"> <li>- information located in different places</li> <li>- risk of repeating mistakes</li> <li>- irrelevant/missing customer information</li> <li>-missing customer visit reports</li> <li>- missing database with customers' action</li> </ul>	<ul style="list-style-type: none"> <li>- manual tracking of customer visits</li> <li>- lengthy handling of customer enquiries</li> <li>- response time delays</li> <li>- incomplete customer information</li> <li>- interaction tracking problem</li> </ul>	<ul style="list-style-type: none"> <li>- information located in different places (customer interactions, sales progress, sales volume control)</li> <li>- lose a potential client</li> <li>- damage existing customer relationships</li> </ul>	<ul style="list-style-type: none"> <li>- lack of transparency of actions</li> <li>- difficulty in tracing actual situation</li> <li>- lack of information and loss of customer confidence</li> </ul>	<ul style="list-style-type: none"> <li>- no access to customer information from a single source</li> <li>- visit reports missing or irregular</li> <li>- Technical capabilities of machinery park stored in one system</li> <li>- no sales path tracking map</li> <li>- missing of competition overview</li> <li>- simplify and speed up the internal exchange of information</li> </ul>
<b>Benefits of CRM</b>	<ul style="list-style-type: none"> <li>- centrally controlled (store all data in one place)</li> <li>- detailed information of customers' and employees' communication and actions</li> <li>- positive impact for employees' communication</li> <li>- strategic decision support</li> <li>- report and analysis</li> <li>-</li> </ul>	<ul style="list-style-type: none"> <li>- manage customer information</li> <li>- improving cooperation</li> <li>- free up my working time</li> <li>- visibility of customer actions</li> <li>- direct access to customer information</li> <li>-better support and service</li> </ul>	<ul style="list-style-type: none"> <li>- improve customer relations</li> <li>- easy access to updated customer data</li> <li>- personal time saving</li> <li>- knowledge sharing</li> <li>- easier information sharing</li> <li>- project and investment data in one place</li> </ul>	<ul style="list-style-type: none"> <li>- have key information about and interacting with the customer in one place</li> <li>- day-to day business</li> <li>-the availability of more information, that enables: <ol style="list-style-type: none"> <li>1. better management decisions</li> <li>2. improve planning by production</li> </ol> </li> <li>- assigning tasks for employees</li> <li>- easy accesses for market mapping</li> </ul>	<ul style="list-style-type: none"> <li>- proper management into customer information pool</li> <li>- digitalisation of functions and internal processes - time optimisation</li> <li>- customer data store in one place</li> <li>- update information in one tool</li> <li>- get the latest news about industry</li> <li>- detailed customer report</li> <li>- overview of machinery park</li> </ul>
<b>CRM System Implementation Focus</b>	<ul style="list-style-type: none"> <li>- defined expectation from CRM</li> </ul>	<ul style="list-style-type: none"> <li>- provide user friendly tool without additional maintenance work</li> </ul>	<ul style="list-style-type: none"> <li>- work simplification tool</li> </ul>	<ul style="list-style-type: none"> <li>- information is easily accessible in one online solution</li> </ul>	<ul style="list-style-type: none"> <li>- customer account information</li> <li>- visit reports</li> <li>- machinery parks</li> </ul>

	<ul style="list-style-type: none"> <li>- understanding of the benefits and changes</li> <li>- understanding current situation &amp; future</li> <li>- competitor section</li> <li>- follow up requirements and KPI</li> </ul>	<ul style="list-style-type: none"> <li>- focus on machinery park</li> </ul>	<ul style="list-style-type: none"> <li>- increase efficiency in communicating with customers</li> <li>- effective training in the use of CRM.</li> <li>- gradual CRM implementation</li> </ul>	<ul style="list-style-type: none"> <li>- clients' data, contracts &amp; attachments at one glance</li> </ul>	<ul style="list-style-type: none"> <li>- market mapping</li> <li>- competition overview</li> <li>- user-friendly, easy-fill &amp; easy-extract tool</li> <li>- access data via laptop/phone</li> </ul>
<b>Alternative Approaches to CRM</b>	<ul style="list-style-type: none"> <li>- ERP (reporting system)</li> <li>- contact details, visits: Excel &amp; local PCs</li> </ul>	<ul style="list-style-type: none"> <li>- BI reporting tool</li> <li>- MS Teams (store price lists, customer information)</li> </ul>	<ul style="list-style-type: none"> <li>- SAP ERP (customer orders)</li> <li>- Excel &amp; emails (customer information)</li> </ul>	<ul style="list-style-type: none"> <li>- Excel list</li> <li>- shared drives</li> <li>- emails</li> </ul>	<ul style="list-style-type: none"> <li>- emails</li> <li>- MS Teams</li> <li>- One Drive</li> <li>- internal folders</li> </ul>
<b>Limitations of introducing &amp; Concerns</b>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- cost factor</li> <li>- acceptance and use of the tool</li> </ul> <p><b>Concerns:</b></p> <ul style="list-style-type: none"> <li>-not fit the needs of the team</li> </ul>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- expensive tool</li> <li>- connection CRM with ERP</li> <li>- CRM implementation separated by business segmentation</li> </ul> <p><b>Concerns:</b></p> <ul style="list-style-type: none"> <li>- non-acceptance by the sales department</li> </ul>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- budget constraints</li> <li>- adaptation</li> <li>-system acceptance by employees</li> </ul> <p><b>Concerns:</b></p> <ul style="list-style-type: none"> <li>- non-acceptance by employees</li> </ul>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- budget</li> <li>- whole change process and management</li> </ul> <p><b>Concerns:</b></p> <ul style="list-style-type: none"> <li>- costs</li> <li>- non-use by employees</li> </ul>	<p><b>Limitations:</b></p> <ul style="list-style-type: none"> <li>- budget approval</li> <li>- implementation time (2 years)</li> <li>- connect internal database</li> </ul> <p><b>Concerns:</b></p> <ul style="list-style-type: none"> <li>Must have:</li> <li>- sufficient background</li> <li>- simplified level of digitalization</li> <li>- manual visit reports</li> </ul>
<b>Expectations from CRM Implementation</b>	<ul style="list-style-type: none"> <li>- managing expectations</li> <li>- direction from top management</li> </ul>	<ul style="list-style-type: none"> <li>- The influence of the sales team for successful implementation</li> <li>- should be intuitive</li> <li>- help with daily work</li> </ul>	<ul style="list-style-type: none"> <li>- planned implementation process</li> <li>- convenient and practical system</li> <li>- improve sales coordination &amp; internal communication</li> <li>- centralized customer data management</li> <li>- company's sales process automation and efficiency</li> </ul>	<ul style="list-style-type: none"> <li>- improve cooperation and processes</li> <li>- simplify day-to-day operations</li> </ul>	<ul style="list-style-type: none"> <li>- simplify the daily operational activities</li> <li>- regularly updated tool</li> <li>- understandable from first look</li> <li>- user friendly tool</li> </ul>
<b>CRM Contribution to Business Growth</b>	<ul style="list-style-type: none"> <li>- identification of specific patterns</li> </ul>	<ul style="list-style-type: none"> <li>- free up work time of sales managers</li> </ul>	<ul style="list-style-type: none"> <li>- increase customer satisfaction</li> <li>- improve sales efficiency</li> </ul>	<ul style="list-style-type: none"> <li>- increase sales</li> <li>- improve customer service &amp; satisfaction</li> </ul>	<ul style="list-style-type: none"> <li>- use of customer information stored in the CRM tool by the sales department</li> </ul>

	- accumulation of knowledge and experience	- interactions with customers are more effective	- improvement of department interaction -complete picture of the market - effective strategy development	-long-term business stability	- direct impact on future negotiations - deliver service to customers
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Source: own research

The above table was built in order to analyse the findings from interviews in more structured and detailed way, focusing on the similarities and differences of participants' opinions on the same topics. Also, the table provides the summary about how current processes and mechanisms are taking place and what changes the employees would like to see by introducing CRM system in the company. In chapter 4.3 “**Benefits of introduction CRM to packaging company**” the results based on the interviews and this table will be described and analysed.

### 4.3 Benefits of introduction CRM to packaging company

Based on the cross-case analysis of the first phase, the below benefits of CRM system and improvements of the business process for packaging company were identified. The below identified benefits are based on the 5 conducted interviews from employees, who are working in the sales team, have gathered significant experience in sales and are in company for longer period of time.

Each benefit is outlined from the perspective of defining interpretation as benefit and which value it can bring to packaging company via usage CRM tool. The section “Impact for packaging company” focuses on the potential improvement of the existing operational process within the company, on the exploring which current business activities can be corrected by employees in order to advance further.

- **Customer information at one glance:**

CRM allows the company to gather all relevant customer information about the account over certain period of time. In this way, a centralised database appears, which includes customers data and the status of interaction with them. With applicable information available at one “pool

data” it lowers the chance of missing context, reduces overall spend time on searching applicable information needed and creates opportunity of linking several knowledge materials into one matrix which can give broader view on the account. In other words, centralised information saves time in processing and searching for the relevant data needed.

***Impact for packaging company:*** As per interviewees feedback currently the customers’ information stored and shared in different places: OneDrive; Excel files; emails; MS Teams messages; OneNote; and other software and hardware solutions. However, with current set up, it takes a lot of time to search information for business requests. Requests can be such as look for customer contacts with detailed overview, in which market customer operates, the history of account development, and recent activities related to the particular account.

Such request takes usually at least 20-30 minutes to collect by pieces information and make further analysis.

By having CRM in place where all customer related data will be stored, provides unique to opportunity for sections like account team members (both external and internal, attachments, account activities, sales data, leads, changes in the account, customer mapping overview, matrix relationships, competitors, and reports to be linked to one customer account. As CRM user by having access to customer account will eventually have access to entire customer uncovers and its related data. The “team members” filed provides information about people involved for this account not only externally from the client side, but also from the internal networking: sales team, customer service, technical key accounts, innovation team and category managers. Attachments would include contracts, SLA, and NDA agreements. Account activities would track actions such as meetings, calls and emails exchanges. Via customer mapping it would be visible in which geographical are customer is operated and what is share of wallet represented based on the reports. Finally, yet importantly, competitors’ section would be used to gather information about current competitive market the company operates in.

- **CRM as part of process optimization**

Via CRM tool there is opportunity for companies to automate its daily, weekly, and monthly processes, makes it easier to work on repetitive activities for employers. As part of CRM field, the usage of sales reports is possible. Such sales analyses are linked to particular customer,

which enables sales managers to get overview of the account in “few clicks”. Reporting can be also built in terms of how many interactions have been recently made with customer account, details on exchanged emails, or who is from colleagues were recently in touch with people from organizational matrix of the account.

In addition, sharing data within the team by using CRM can be executed via tasks sharing feature. Which makes the assigning tasks from one side transparent and easier, which enables also improve internal interactions and be more efficient. At the same time by granting access to the customer account to colleagues from different departments allow to work on one account together by adding missing information.

Automating reports such as order intake, turnover reports, board consumption per customer account will make CRM tool more beneficial for employees, as it will also allow synchronisation process with existing sources. In addition, data received via email can be categorised, archived and retrieved, creating a centralised repository of information.

CRM users will benefit from digitalisation with features such as lead tracking, social media marketing, creation of personalised profiles, market mapping, competition overview and the technical capabilities of each plant.

**Impact for packaging company:** All the interviewees highlighted several potential opportunities that CRM can provide in terms of optimization processes particular to be applied for packaging company. One of them is the optimisation of daily processes, or tasks that are repeated in a certain period of time. Thus, time spent on activities that can be done in a shorter period, can be redirected for a more urgent actions and make prioritization activities.

For example, via CRM tool employee can delegate or assign tasks to another employee.

As soon as person opens the assigned "task", he or she will have all the necessary data and documents that may be required to fulfil this task. Data from market intelligence or an account strategy plan developed by other colleagues.

Or when certain sales data reports are generated automatically and assigned to customer account within the CRM database, those reports can be transmitted within the departments or sales

organizations located at different geographical locations. There is no need to share any customer related information per email, rather than have access to this particular customer in CRM.

Optimisation tools will simplify downloading and updating of reports, with the possibility of their formation based on the needs of the user. It will also make it possible to take notes during meetings, which will increase the efficiency of notetaking and directly relate to the creation of a centralised database in customer account. CRM allows contracts to be linked, giving staff a quick and complete overview of all contracts relating to a particular customer, helping them to avoid missing expiry dates of contracts, or any important attachments such Service Level Agreements, Non- disclosure agreements and etc.

- **CRM as strategic reporting tool**

CRM as strategic reporting tool enables generate report that include variable information about customer account. This information is represented via several fields such as general information about customer, and more complex analytical data that links to reports about order intake overview, turnover parameters, EBIT values and overaged stock. Having implemented sales statistics as part of CRM provides up to date overview about customer account.

Among with sales reporting, visit reporting is also integrated into CRM tool, whereby synchronization with contacts from outlook provides additional information about customer. Visit reports play crucial role in terms of data collecting on details, specifically summarizing how many meetings recently took place with customer, what was discussed and agreed by participants. The visit report can be also made during the meeting, via phone, PC and personal tablet. In that way, all information that was discussed during the meeting is collected in one report and linked to specific contacts and accounts.

Documented visit reports can be shared via sales team members or used by the participants as a tracking actions tool, ensuring quick communication, coordination and alignment on the actions to better serve clients.

Another benefit to improve visibility on client profile and be able to transfer it via strategic reporting is linked to market mapping. Based on market mapping data it is possible to get better understanding about company's share of wallet in customer world. Which share of business

that is currently supplied by company is already filled and which part of business under the competitive supplier. It is very useful also understand geographically which customer market is free to enter, and which territories are currently under majority of share of business are occupied. Having market mapping as part of digitalized reporting brings opportunity for such reports to be used widely by different business departments and can be shared with top management during the growth strategy meetings.

Apart of market mapping, competition overview is another additional channel that should be included into CRM reporting. The competition section is usually a combination of what has been known via market research studies, business magazines and as input shared by marketing intelligence team. And second part of knowledge coming from employees who are taking lead on that customer and gathering information about competition via networking channels. Competition information is very valuable asset enhancing the understanding of the competitive landscape within specific industries. Therefore, it is essential to have included into CRM reporting.

In general, CRM reports are made in user-friendly and simple way, allowing learning process to be fast and uncomplicated after implementation. Varied data that is conducted in semi-automated and manual ways about different parameters related to one account can be extrapolated into separate analysis for specific purposes.

**Impact for packaging company:** As per interviewees feedback currently each employee on the demand or request prepares sales reports most of the time manually, in some exceptional cases it is possible to get additional information from BI tool. As BI tool is not updated on daily basis, there are often cases when report needs to be combined with outdated data from BI reporting tool. In general, spent time on preparation of reports takes too much time.

Therefore, sales reporting optimization available within CRM tool allow users to have direct access into reporting parameters faster and provide transparent information for selected customers. Team members believe that the digitalized sales reporting would optimize the information flow among senior managers in a way that at tend will allow them compare similar indicators for different customers. Setting the common ground rules for strategic reporting



would bring more transparency when speaking about same reporting measures such as turnover reports, EBIT values, order intake situation per customer and overaged stock of paper.

Another example where reporting optimization can be bringing internal process on the improvement phase related to visit reports. At the moment, the company's visit reports are simply a summary of the meeting, which takes a different amount of time for each employee and is formatted differently. Some reports include many relevant details, some reports represent short summary, which does not always bring better overview on the meeting with customer and next further strategic steps towards business improvement.

By introducing visit reports as part of CRM reporting system, reports will be standardized with clear instructions which information is obligatory to be included; clearly defined shape of reports will improve overall quality of visit reports and at the end, the user-friendly surface will be liked by users that will allow the usage rate to be higher. Opportunity of linking the report to a specific customer digitally will allow to capture historical discussions at one place and be seen as additional resource for predicting customer behaviours and meeting customer needs and expectations.

The market mapping information provided by the market intelligence will be entered into the CRM system, thus facilitating the work of the sales department in determining how big the customer is in a particular region and how much business the company is doing in this particular region. By having internal business review meeting, market-mapping data will provide better overview on the account for those employees who are not familiar with this account. At the same time having market mapping feature available will encourage employees to add information relevant to customer account occasionally.

Besides market mapping, competitors' section is essential field, which can be also seen as part of strategic reporting exercised for particular customer account. By operating in particular industry, indeed company is aware of its competition. However, as a packing supplier selling its products to different customers being active in different industries it is not always easy to know what the competitors of specific customer account are. By having information about competitions allows company to broader its scope of business and eventually seeking for new opportunities.

- **CRM as united tool**

CRM brings benefits not only to the sales team, but also to other departments and functional groups, including Marketing, Supply Chain, Technical Sales, Customer Service, and Product Development Innovation teams.

Team members from marketing team can bring from one side contribution to CRM features by adding marketing materials, technical specifications for raw materials (board paper) relevant for selected customers. Colleagues from marketing intelligence can also bring value by linking relevant studies and articles about industry or market to customer accounts or adding information of share of business as part market mapping exercise.

Customer Service by having direct access to the customer information will be able to see full status quo on the account, in terms data analytics what is the latest overaged stock values were reported or to extract information which was requested by customer directly.

Technical teams can store the data about innovation projects that currently running and keep attachments at one place by linking internal and external stakeholders that are relevant for this project. It will enable to see how many people are involved in the project and what organizational matrix to this regard is. Machinery park is another adding value section that represents the overview of the machines available in particular plant. It is sort of audit information about how many printing lines available and at which formats, how many cutting machines, gluing lines and window patching machines are available in each factory in each country.

As internal interaction feature “Delegates” function can be added into CRM, allowing appoint other people for actions in account when other stakeholders are out of the office. Or when there is significant change in human resources and new team setter up, via delegate function there is a benefit to delegate the entire information and account to different appointed team members.

Storing contact information and making it available to other departments will ensure interdepartmental access to enquiries, efficient interaction with customers and exchange of

promotional materials. The tool gives opportunities to share knowledge with different business units and departments, having latest overview and news about customer account that will bring additional transparency.

**Impact for packaging company:** CRM tool would be used by different departments of business units and provide complete overview about customer and the information would be accessible to different team members. It would allow users from one side add missing information about customer, at the same time gain knowledge about this account and look for the needed information. It would not only improve departments' cooperation by introducing the united tool, but also facilitate better workflows.

On everyday basis the sales team members receive various requests from customers. In order to fulfil those requests, it usually takes longer time to gather all information, reach out different teams for the requested information. By uniting the forces and pre-collecting information, linking to relevant account, it can save not only time spent on request, but overall improve the service delivered to customer. The sales team can make justified decisions with easy access to real-time statistics, reports, and the required data. Thus, marketing intelligence using CRM and their assigned fields to provide the latest industry news and assess the impact on the market more effectively.

Technical Account Managers by studying the information in the machinery park field would be able to get overall overview of available technical capabilities and match them with customer requests. Interviewees highlight that it takes time to compile an internal overview of the plant to which location/particular plant the tendered business should be allocated.

Via "Delegate" function, the company gains advantage by keeping the knowledge in the house, regardless the changes in the team or its rotations. In this way historically gained information can be used by new users, transferred digitally to new users and temporary delegated for certain period of time.

Granting access to the responsible people assigned for particular account, gives additional transparency between teams and departments. Just looking into one customer account a lot of

insightful information can be analysed that made it appealing by involving many different teams with differentiated scope of areas.

- **Growth via usage of CRM features**

In addition to above-mentioned benefits, another benefit is related to the fact that CRM application empowers growth of the company. So called Sales path function can be integrated into CRM and provides tracking of progress in new customer acquisition and its promotions. In this way the company gets to track the sales journey, from the moment of first contact with potential customer until trial phase and negotiation of contract. The information from first contact with potential customer comes from the “Leads” field. “Leads” refers to the separate section of CRM, in which all potential customers and new contacts are registered, specifying the opportunity and way how this new contact was found. For example, during the networking events such as sales conferences, trade fairs or promo events. Once the lead contact was registered, it is one of the first step to reach out potential customer and eventually first phase opportunity to growth business.

Via Sales path field in CRM tool, there is possibility to see the whole history of won and lost opportunities with potential customers. By analysing collected information on the different stages of trials acquiring new business, it is a chance based on the experience from past prevent the loss of customers in the future. The sales path shows the data and history of all proposals and interactions linked it to a specific account. It enables to make in depth analysis, accessing to data that shows the status of customers, their losses and possible reasons for it.

Another growth aspect can be visible via market mapping function, which allows company to better understand the business and the market in which customers. The sales department can identify potential customers and market segments that the packaging company can target. All available information from market intelligence is loaded into one system and attached to specific customers. Obtaining geographic data is also a big plus and is useful in developing sales strategies and product offerings. Sales managers optimize territory allocation to ensure that salespeople are working in the right geographical areas. Market mapping provides a complete overview of the market and business in a particular region, as well as information on

competitors, and further assist in formulating an effective strategy to combat them. In this way the company, in particular the sales department gets access to customers in a particular region, a complete overview of the market and the industry.

**Impact for packaging company:** The sales path as part of integrated solution of CRM tool will bring many benefits to the company for both sales and business development department. Analysing the customer base and finding opportunities for business growth are two things that CRM data can be also used for.

Sales path analysis will provide the opportunity to track the historical development of new business. For example, there have been situations where members of the sales team have contacted a customer multiple times with the same offer. It can also be learnt from the interviews that there are cases when a potential client was contacted, but the offer was rejected for some reasons. However, after a certain period of time the employees of the company contacted the same client and faced the same result. In other words, CRM gives a company the ability to track and store all actions that have occurred with a particular potential customer. Such information will include actions that occur at a given time, thus preventing repeated interactions with customers. Additionally, the system will have information about all failed transactions, at what stage the company lost a customer and for what reasons. In the future, having information about previous interactions, the company will be able to re-contact a potential customer with a modified offer.

In current set up of packing company the sales team submits request to market intelligence asking for information about the customer market in order to obtain information about the share wallet in a specific location. It may take some time to collect the data and provide the report. With the introduction of CRM in the company, employees will have access to market mapping tool. With joint forces of marketing intelligence team, the data will be accurate and used widely by different team members allowing sales team build right account strategy using the relevant data about customers. In addition, the data related to market mapping enables to make more accurate sales forecasting. For example, if forecasts show an increased demand for a product in a certain region, it will help the company effectively make prioritized strategy for new business. Market mapping provides insight into the competitive landscape in different regions, helping

company develop an effective customer experience strategy and tailor its offerings and pricing to better sell its services and products in a particular region.

#### 4.4 Identification of focus areas

Based on the information gathered during the interviews and its cross – analysis, classification of CRM benefits and its particular potential impact on the packaging company, following focus areas were identified.

Graph 5. Focus areas of CRM



Source: own research

- **Accounts**

Each customer has their own account in which all related information is displayed. Account field is uniting all linked sources about the particular customer. The collected information includes contacts, attachments, activities, leads, sales data and customer mapping overview.

- **Contacts**

Contacts in CRM include information about the customer's name, contact email, customers function within organization, responsible person assigned for this account.

In this section can be entered also new contacts that has been generated during the networking events or recent customer visits.

- **Visits**

The "Visits" section stores information about all finished, planed and cancelled appointments with customers. It helps easily to track all meetings with clients, an captures information during the meeting as well as documenting follow up actions. The standard visit reports usually include information about subject of the meeting, its participants, minutes and to do lists, deadlines, and planned follow up meetings.

- **Emails/ Phone Calls**

All calls and emails are displayed in the accounts linked to them, with information about the subject, status and originator of the email or phone call. During calls, you can write notes, which will also be displayed in the CRM in order not to miss important points that were identified during negotiations. For emails, you can select which of them are more important, to which category the emails belong.

- **Tasks**

Assigning tasks to another employee using CRM with provided necessary data, contracts, and documents to complete the task. Once a task is assigned, the employee has full access, and clear path which data sources to use to accomplish the task. It is also possible to give a task with time limit and status tracking option - whether the task is completed or still in process.

- **Reports**

In this section all different type of reports can be visualized, linked via ERP system and displayed for particular account. Manually made reports can be digitalized and automatically saved by CRM users in the Report section. Sales development, order intake, over aged and board consumption reports are the examples which can be available in the section. It is very usefully feature towards digitalization and optimization of processes.

- **Competitors**

“Competitors” section can be divided into two parts, one part gathers information about packaging company’s competitive landscape and another part collects information about potential competitors of customers. This section can be used to extend customer portfolio for the company, by identifying competitors of the existing customers. The information related to the competition usually added by marketing intelligence and sales teams.

- **Employees**

The overview of all employees registered in CRM, across different business units, departments, categories, and teams regardless geographical locations or assigned customers. The matrix of employees would allow communicating faster and assigned tasks digitally, as well as providing visibility which employees are involved for specific topic related the same account.

- **Delegates**

The function “Delegates” is used to assign other employees to perform actions on the behalf of responsible people for the customer account. Also, it can be used if there are some changes in the team set up, people are on sick leave or left the company. This feature allows to fully transferring user rights without losing any important data and access to customer account information.

- **Machinery Park**

Machinery park consists of information about technical capabilities of each plant with detailed description of type of machines, and overall equipment structure. Once you link the customers products that are supplied by specific plants, it will be easily to track the current operating model or potentially think about alternative plants that can supply the same products from different geographical locations. It is especially important to have such information available when it comes to strategic decisions related to the customer account plan.



- **Leads**

“Leads” section refers to the new contact registration procedure. By registering prospected customers or potential clients, there is a data about event which leads to create the new contact’s name, company details, status, and any additional information that is relevant can be added. Leads usually registered after some trade fairs, sales conferences or networking events.

- **Sales Path**

Sales path provides overview of the new contacts that can be at the later stage become prospects customers. Via this feature it can be visible the customer growth projects depending on the stages of the sales path. Some customers will be just on the prospecting phase, with some will be scheduled the meetings. Other customers will be on the stage of receiving business proposal from the packaging company, meanwhile with some clients there will be negotiations taking place. The most advanced phase would be when potential clients will be during the trials& qualification. That would mean in majority of cases won opportunity.

- **Market mapping**

A complete overview of the market and industry that can be provided by market intelligence and other departments to better understand the market and the industry customer operates in. The market mapping data gives an idea about the size of the customer in geographical scope, which allows to define the company's development potential and potential growth strategies. It also gives overview what is current share of wallet packaging company has for its customer and how much potential to growth in different locations.

These focus areas serve as a basis package to be taking into account when introducing CRM to the packaging company, assisting the primary needs of the company, and supporting existing processes in terms of optimization and general improvement.

## 5 Conclusion and recommendations

“CRM is the process that addresses all aspects of identifying customers, creating customer knowledge, building customer relationships, and shaping their perceptions of the organization and its products” (Srivastava, Shervani, & Fahey, 1999). Among with various definitions of CRM existing nowadays, CRM has been also evolved as concept and can be specified as strategic, operational and analytical type.

Strategic type pays attention to attraction of customers and its retention. When the focus is on the improvement of processes and automation of systems, it is considered as operational type. In general, CRM simplifies communication with customers and improves the functionality of certain areas that covers the work of departments and interactions within the company. Analytical type includes processes that use customer data to achieve strategic goals, which refer to increase number of customers and growth of business (Maklan & Buttle, 2015).

These are the examples of solutions, which any company would seek in order to overcome challenges if it was successful in the past, but recently had to face external changes, major disruptions and challenges. COVID outbreak, Russian - Ukrainian conflict and strong inflation changed the business drastically via reduction of order intakes, losing customers due to delivery performance and sales prices, as well as caused shift from branded products to private labels – all these were prerequisites for packaging company to face challenging business path and call for actions.

The main purpose of the study was to identify benefits of CRM system and potential impact for packaging company, specifying which changes are necessary to take in order to optimize existing mechanisms. Based on the findings from interviews and its cross-case analysis, major five benefits were identified.

The implementation of a CRM system provides the availability of all *customers' information at one glance*. This reduces the likelihood of knowledge gaps and improves customer relationships. In addition, having information in one centralised database reduces the time spent searching for it in different sources.

***CRM as part of process optimization*** that makes work easier and saves time for employees. With the help of the system, it is possible to optimise daily tasks and provide reports in easy and user-friendly way. Communication and data exchange within the company through the task exchange function increasing the efficiency of work.

***CRM as a strategic reporting tool*** allows the creation of reports that have variable information about customers, both collected manually and generated automatically. Within the implementation of sales statistics, the users will receive up-to-date information related to particular customer account. Via visit reports the information is shared in standardized way and being easily accessible by users. Market mapping improves the visibility of the customer profile, providing a complete view of a company's share of wallet as well as geographic market insights to drive business. Moreover, the "competitors" section is an additional channel included in CRM reporting, that enables better understanding of competition environment.

Both the sales department and the entire company can benefit from ***CRM as being united tool***. Different departments can link various information that they have to specific customers. As a result, sales team gets a complete overview of customer data, which affects the efficiency of enquiry fulfilment. The technical team stores data on current innovative projects in one place, which gives visibility to the number of people involved in the project. As a return increasing visibility and transparency among involved team members.

CRM provides the company with a "machinery park" function, which gives full overview equipment available in certain plants. This is another example how information can be stored and used smartly, enabling additional way of accessibility of data. With the "Delegates" function, it is possible to delegate access to customer accounts to other team members. All functions ensure the exchange of up-to-date knowledge between departments, which provides additional transparency and effective customer interaction.

***Growth via usage of CRM features*** is another essential benefit that can be distinguished in several ways. The function "Sales Path" that is integrated into CRM gives access to track the progress of attracting new customers and further interaction with them. It is possible to carry out in-depth analyses, which shows an overview of customer losses and possible causes. Via function "Leads", new contacts can be registered, giving more insights by which business

occasions this contact was given. “Market mapping” also contributes to the growth of the company, by having an overview of the market and industry in certain geographical locations. Thus, the sales department identifies potential customers and market segments in which to grow the business.

Referring to the question how CRM system can improve daily business operations and processes, the following advantages can be outlined.

Implementation of CRM will bring the company a **synchronized one source database** and opportunity for the users to **access all customer information** with “one click”. In one customer account can be easily accessible account activities, sales data, leads, changes in the account, customer mapping overview, matrix relationships, competitors, attachments and reports. Having customer information at one glance will allow company to **improve efficiency in the response** time to customer and providing better customer experience with services. At the same time, it will boost changes in the existing way of working, regulating more standardized approach when it comes to storage of data and tracking information flow.

CRM tool is triggering to **optimize existing processes** in the company. Thus, the current time spent on day-to-day tasks can be performed in a shorter period of time, by using more automated reports and digitalized implemented system in place. Employees will be able to assign, and transfer required documents and customer data within the system, eliminating the exchange of information via email and using more **standardized automated policies** within the entire company. The tool will simplify the uploading and updating of reports, as well as generation of new reports or improving the existing ones.

Another feature, how packaging company can benefit from CRM, relates to reporting function. CRM tool can **advance sales reporting**, through balancing information flow within the organization and providing opportunity to make comparison of similar indicators for different customers in one tool. Setting the common ground rules for strategic reporting would bring **more transparency** and **better understanding of the sales parameters**. Introduction of updated versions of visit reports will improve overall quality and will increase the usage rate by users. Possibility of linking the report to a specific customer will allow capturing historical discussions

at one place and can be seen as additional resource for **predicting customer behaviours and meeting customer needs and expectations.**

CRM tool can be used by different departments of the company, providing to the users' broader overview of the customer account. Possibility to add missing information by one team and then using this input by other teams would **improve collaboration between departments**; knowledge sharing exercises on the daily basis will **facilitate better cooperation on the operational topics** in order to deliver excellence service to the customers.

One of the biggest advantages, which CRM can bring to company, associates with potential **growth of the business.** Both sales and business development teams can contribute from analysing the customer base and **finding new opportunities to expand customer portfolio.** Integrated sales path analysis tracks the historical development of new business and gives possibility **to follow the development of business relationships** with potential clients from the beginning. By learning about all failed actions with potential customers, at which stage and specific reasons, the CRM users will be able **adjust the strategy and modify their actions in order to acquire the business.**

In addition to sales path function, another association that relates to growth of business is market mapping. By using relevant market data about customer industry and its products, sales team would benefit by using the data of marketing intelligence studies to **build right strategy**, make proper **forecasting for prioritization of business** allocation and **identify niche for growth.**

After all, CRM implementation is highly recommended for packaging company in order to defend existing business portfolio, acquire new customers, search new opportunities for growth, improve commercial excellence and optimize the current existing processes.

## 5.1 Recommendations

During research the benefits of CRM system and its potential impact for packaging company were identified. Further, I discussed which focus areas can be considered specifically when introducing CRM to packaging company. Those focus areas are Customer Accounts, Contacts, Visits, Emails/Phone Calls, Tasks, Reports, Competitors, Employees, Delegates, Machinery Park, Leads, Sales Path and Market mapping. These areas of CRM system need to be considered as basic features while introducing CRM into the packaging company.

After highlighting the reasons of CRM importance, its practical application for company and which basic CRM features take into account, there is still a risk that implementation can be challenged.

It is essential from the beginning that company will overview about primary functions that should be included in the CRM in order to choose the right CRM software solution. For example, Forbes highlights several CRM solutions that are relevant in the market at the moment: HubSpot, Salesforce, Pipedrive, Monday.com, “SAP CRM, “Oracle Siebel CRM” and others (Novak, 2023). Most famous and commonly used are solutions provided by SAP and Oracle. Each CRM-solution differs in price and features provided, but each can be customised to suit a company's needs. (Pohludka & Štverková, 2019)

In order to overcome limitations and challenges during CRM implementation, it is necessary to make sure that the company culture is ready for introducing the digital tool that might affect internal operational processes, to prepare employees for upcoming technical trainings and to align on the common readiness for change (Steel, Dubelaar, & Ewing, 2013). Essential part in the successful implementation of CRM plays the fact how common strategy of the organization aligned within CRM objectives and customer-oriented approach.

When the focus placed only on the technological concept of CRM, there is high chance the CRM capabilities will not be unlocked at full range. Aside from the connection between technology and business procedures, employees are another important factor (Eid, 2007). It is worth paying attention to a clear definition of the company's strategy and to the enhanced

training of employees to promote a customer-centric philosophy, maintaining and improving customer relationships (Kumar & Reinartz, 2006).

By introducing CRM mechanism, it is also important that the implementation is fully supported by top management, who acts as a role model user – maintaining and exploiting CRM to meet desired results (Pozza, Goetz, & Sahut, 2017).

An important step to a successful implementation is to build a team to move the project forward. The team should be cross-functional and include members such as marketing and sales executives, IT representatives and end-users of the program (Novak, 2023). Often before the kick off of the project, the workshops take place where participants share their wishes what they would like to be included in CRM application, and link with the needs of the business. By active participation of the users into the “drawing concept” and share transparently the phases of the project on each stage of the implementation, the higher chance is to have smooth integration of new system into the organization. (Pohludka & Štverková, 2019).

The purpose of the project team is to describe the system and explain the reasons for using, discuss all functions that are unclear for the company's users (Pohludka & Štverková, 2019). Once CRM has been selected and employees understand the benefits and importance of CRM, a clear training plan for the users should be developed, including the follow up trainings during the active usage of the program. At this stage, it is also recommended to use CRM vendors that provide and manage the training (Novak, 2023). With the assistance of experts, the training is completed efficiently, which will facilitate the organization's ability to modify its business procedures.

In addition, CRM implementation needs to be supported by not only top management, responsible project team and employees, but also by additional internal marketing objectives in the company and by integration of internal processes with technology (Pozza, Goetz, & Sahut, 2017).

When all above mentioned conditions and set ups are taken into account and being prioritized, there is low risk that the implementation of CRM can go in the wrong direction and will not meet the original expectations of the company.



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## **7 List of pictures, tables, graphs and abbreviations**

### **8.1 List of figures**

Figure 1. The Research Model .....	18
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### **8.2 List of tables**

Table 1. Overview of sales team.....	12
Table 2. Definition of CRM.....	16
Table 3. Cross-case analysis of interviews .....	32

### **8.3 List of graphs**

Graph 1. Sales Development 2000 - 2022.....	28
Graph 2. EBITDA Development 2000-2022.....	29
Graph 3. Order intake 2021-2023.....	30
Graph 4. Packaging Division 2022 - 2023 .....	31
Graph 5. Focus areas of CRM.....	46

## 8 Appendix

### Interview answers from Sara P.:

1. What advantages or disadvantages do you believe CRM has?

In my view, CRM offers several advantages. It provides easy access to data, centralized information, enhances transparency, and enables knowledge sharing across a broader group of people within the organization. CRM is especially useful for internal communication in CRM. A function such as "Delegation" will give access to another colleague to perform actions on an account or transfer all information when forming a new team or there is change in human resources.

However, implementation of CRM has disadvantages of course. I can accurately distinguish that employee adoption of a new software solution is worth considering. It requires a change in mindset and management to facilitate its adoption. Additionally, there may be some administrative work involved in maintaining the system.

2. Where/How do you store customer information and its related business content?

In my case I store customer information on my personal drive on PC, OneDrive and in emails.

3. What type of customer database is available for all employees to access and use?

At the moment, we have access to Customer Master data in ERP system. It includes order information, various reports related to sold volume.

4. Do you have customer visit reports? How it looks like? How often do you need to fulfil?  
How long does it take to fulfil one report per visit?

Currently, our company did not have a formal format for customer visit reports. We provide reporting in emails with information about the meeting with the client.

Personally, it takes me an hour to compile such a report. We could spend a lot less time if visit reports were synchronised with outlook contacts. The system could allow us to see all visits in one click, instead of searching for meeting data in the mail, where it is scattered in letters. Such an action takes quite a lot of time.

5. What is the approximate time you spend for the following business tasks?

<b>Nº</b>	<b>Business processes</b>	<b>Description of business process</b>	<b>Approximate time/min.</b>
1	<i>Prices (search, update, review)</i>	Excel file with Price List + BI reports	Around 15-30 minutes
2	<i>Customer information</i>	It's stored in share folders and files, also in OneDrive and I have personal data in my PC	10-15 Minutes
3	<i>Automation park/ technical information per plant</i>	Data collected during customer visits is subsequently recorded in files (for example power point, excel)	If data collected – it takes around 20 minutes
4	<i>Contracts and annexes (review, update, analysis)</i>	This information is stored in shared folders	10 minutes
5	<i>Reports</i>	Accessible BI sales reports (often require filtering)	It depends on the complexity of the report. 35-60 minutes
6	<i>Account planning/ Strategi c plan</i>	Carried quarterly	100 -120 minutes
7	<i>Assigning tasks to other company members</i>	MS Teams chats, video and audio calls, emails	Around 5-10 minutes for one member
8	<i>Opportunities information</i>	Centralised documentation to enable strategic planning (customer interactions, market research reports)	15 minutes

6. Do you see any potential process optimizations to be applied within the current sales daily activities?

Definitely, on the one hand “standardization” to the extent that would work for most colleagues, as often the same information is needed and extracted in many different ways which requires manual and time-consuming work.

On another hand automation, because some processes are repeatedly done on a daily, weekly, or monthly level and this can be automatized. Then I'll have more time for more important things. And what is done on a regular basis can be automated and less time consuming.

7. Where do you see potential for digitalization/ automatization (using technology to automate tasks)?

Digitalization and automatization can be applied in data gathering, report generation, data entry and storage. I would also like to see easier access to sales reports as well as linking all reports to specific accounts so that I don't lose information and can easily find the right data to specific customers.

Another advantage I would like to highlight is the provision of information about Leads in one place. Having a centralised database of all customers who are already working with us is a plus, but I would like to have the same for potential customers. In this way the sales department would be able to contact these contacts with greater efficiency - with clear, organised and clearly distributed information. Many contacts can be collected during networking events, but some of them are stored in Excel files, others on phones, outlook contacts and often customers are lost or become irrelevant over time.

8. Do you face any difficulties in daily duties with customer relationship activities? (e.g., limitations in tracking and controlling the volume of sales, customer account, opportunities tracking, and etc.)?

In general, not, as information is available in the system – it is just scattered across different places/solutions, so it could be time consuming to find it and extract it.

However, there are times when multiple team members are contacting clients. We don't have one database, with information that is updated in real time. Therefore, sometimes we may contact an existing or potential client, which is not always good for our reputation and sometimes just puts us in an awkward situation. To avoid this,



it might be better to introduce tracking of all activities with prospects, such as Sales Path.

As I mentioned above, we also don't have specific visit reports. Attached overview of visits to a certain client - reduces the time to find this information, which will provide tracking of actions with clients.

9. Have you experienced significant damage of customers' relationships due to lack of technical support/ missing data in the form of a CRM system?

I could emphasise that having a CRM system - the exchange of information with customers would be easier, faster and simpler for both the company and the customer. Without good enough technical support, there have been cases where it has not been possible to diagnose and solve a customer's problem in a timely manner. There is a risk of repeating mistakes without a systematic way of tracking problems.

Also, a lot of information about customers is often irrelevant or missing, which directly affects the relationship with them.

10. Based on your knowledge and understanding of your company's sales processes do you think CRM system would be beneficial tool?

Absolutely, but it is crucial to collect all needed business requirements and match that with the adequate CRM solution. Also, it is extremely important to manage the expectations of what the CRM tool can do/offer to sales colleagues and what are the benefits for them. Mindset and change management should not be underestimated in the whole process, as well support from top management organization with clear requirements and expectations.

Implementation should be done in gradual steps. However, I see many benefits when implementation is successful. I can highlight one of them: reporting and analytics. As I mentioned above, at the moment we don't have standardised reports, but having more reporting capabilities will allow us to identify areas that need improvement.

Another important factor is the storage of data on one system. This saves time spent searching for customer information, at whatever stage it is in. For example, we have already contacted this customer, or we are already discussing a deal with him. Thus,

all necessary information concerning the client will be presented from one source, which will greatly facilitate the work of me and my colleagues.

11. Where, in your opinion, should the focus be applied when implementing a CRM system?

The focus should be on defining what is expected from CRM tool. It is also important to have a clear understanding of the benefits and changes that the implementation of a CRM tool will bring to the company. Especially understanding of the current situation and in the future, already with the existing CRM.

Once these aspects are clear, collecting detailed business requirements and expectations becomes essential. Afterwards, once the CRM tool as a solution is implemented it is important to follow-up with clear requirements and KPIs of its usage. I would also highlight the customer overview that is important for CRM reporting. Of course, we know about our customers, but we don't always have information about the competitors of a particular customer. Our product suppliers sell to different customers and in different industries. We have some of our information from market research and business magazines. But we need to personally ask and provide requests to the marketing intelligence team to make decisions. On the time-saving side, it would be easier to have information separately about customers in a particular sector, and it would also make it extremely easy to find new opportunities and develop business.

12. How do you think you can benefit from CRM taking into account the scope of business activities you are responsible for?

Due to data availability and transparency a lot can be steered centrally. Once data is available in the system it can be used for further analysis and certain strategic decisions.

And as I mentioned before, it would be great to have a sales path. All information about communication and actions with potential customers would be available to everyone and provide the necessary transparency in the actions of each employee.

13. As currently CRM system is not introduced in your company, what are alternative approaches are taking place now? What is alternative to CRM system?

Different reporting systems linked to customer data in ERP, but this is mainly restricted to customer order data. For other information, such as contact details and visits, we rely on Excel files and local PCs for storage.

14. What specific limitations or boundaries does your company have in place when it comes to implementing a CRM system?

Cost factor is significant limitations, but equally important is the acceptance of the tool and usage by sales colleagues.

15. What potential fears or concerns does your company have regarding the implementation of a CRM system, and what factors contribute to these apprehensions?

In my opinions one of the most important issues is to make the CRM fit the needs of the sales team. Which solution will be the most user friendly and still bring benefits. There won't be much point in maintaining a CRM if it doesn't suitable for sales needs. Thus, the system will not be used and the money and time spent on implementation will not pay off.

16. What would you need/expect from the implementation of CRM?

I would anticipate that expectations are managed from the very beginning of the implementation process. I'd also like to point out that it's quite important to have clear direction from top management regarding the CRM's usage and objectives is essential.

17. How do you think a CRM system can contribute to the overall growth and success of your business?

Because information will be collected in one place, it will be easier to identify certain patterns and use more data driven decision making approach. Also, knowledge and experience from colleagues will be to certain extent stored and collected in this solution.

18. Who else from the company can benefit from implementation of CRM system?

Various departments that interact with our customers can benefit from CRM, including Marketing, Supply Chain, Technical Sales, Customer Service, and Product

Development and etc. In other words, using the system provides a complete picture of the customer, both for each department and sales team member. Thus, there will be an easier way of transferring and accepting information from different departments, which will have a positive impact on the company's performance and communication between employees.

## **Interview answers from Julia P.**

1. What advantages or disadvantages do you believe CRM has?

I can emphasise a few advantages. Firstly, it allows us to have a comprehensive view of all our customer interactions in one place. This is crucial for understanding customer needs and preferences. Additionally, CRM is a system that helps sales for their daily life - bringing needed statistics, approval mechanism in one place. On the other hand, Customer Relationship Management might create extra administrative work and what usually required to “feed” the system.

2. Where/How do you store customer information and its related business content?

At the moment we have a few different ways how to store customer information. Contacts stored as Outlook contacts and/or as mobile phones contact list. For customer visit details, these are typically shared through email communication. And for important emails and contracts they are stored at share point folders.

3. What type of customer database is available for all employees to access and use?

You can create customer lists based on sales volumes from SAP ERP or from business intelligence (BI) reports. This allows all employees to access and utilize customer data efficiently.

4. Do you have customer visit reports? How it looks like? How often do you need to fulfil? How long does it take to fulfil one report per visit?

In our company we don't have a fixed format for customer visit reports. Commonly, It is simple email with summary/minutes of a meeting.

The time it takes to complete one report can vary depending on the length of the meeting and the number of topics discussed. Usually, it should take about 1-2 hour to make such email. The most common problems are that time is wasted searching for such emails for each customer and some information is lost later. Due to the unclear format of these reports, time is wasted that could have been directed to another activity or process.

5. What is the approximate time you spend for the following business tasks?

<b>Nº</b>	<b>Business processes</b>	<b>Description of business process</b>	<b>Approximate time/min.</b>
1	<i>Prices (search, update, review)</i>	Business Intelligence reports: Excel file with overview of last inquires	20-30 min
2	<i>Customer information</i>	Personal notes stored at my laptop	5-10 min
3	<i>Automation park/ technical information per plant</i>	The information obtained during customer visits and then saved	5-10 minutes if collected
4	<i>Contracts and annexes (review, update, analysis)</i>	Stored at shared folders (e.g., OneDrive)	5-10 minutes
5	<i>Reports</i>	Business Intelligence reports for sales available, but still, you need to finetune them, apply filters, etc	10-60 minutes, depending on complexity of report
6	<i>Account planning/ Strategic plan</i>	Done during quarterly/HY business review meetings with customers	60-120 minutes
7	<i>Assigning tasks to other company members</i>	via emails	5-10 minutes per email
8	<i>Opportunities information</i>	Collected on fairs, customer interactions, inquiries from company page, stored via emails, personal notes	10-20minutes

6. Do you see any potential process optimizations to be applied within the current sales daily activities?

I believe there are several process optimizations we can implement. The first thing I can highlight - sales reports to be shared and stored in CRM. Since reports are hard to search and exchange through emails, common storing and sharing should improve collaboration within team. In addition, we compile these reports manually. Most often the information is taken from the business intelligence tool. However, the data is not updated daily, and the report may contain outdated information. Sales report usually takes about 40 minutes if the data doesn't need to be searched from different sources. Secondly, we can enhance how we store and access account and customer information, making it in smarter way. Moreover, it would be better if the reports had one format. And since sales reporting is not digitised - top managers cannot compare similar figures for different customers or it takes quite a long time to collect all the information. Especially when it comes to EBIT, order status and activity with the customer and paper stocks in the mills (overstock). Moreover, contact information need to be stored in CRM so there is access also from other departments. For example, departments like marketing for inquiries, customer inquiries or promotional information sharing.

7. Where do you see potential for digitalization/ automatization (using technology to automate tasks)?

I can provide a few suggestions. First of all, we should work on linking customer accounts to our ERP system.

Additionally, automatized customer visit reports, synchronization with Outlook for contacts and planned customer visits and availability to access to customer information, visits, contacts from your mobile phone are all areas where technology can greatly enhance efficiency. Email automation allows data to be categorised, archived, and retrieved, creating a central repository of information. Also, I would like to mention such a function as giving colleagues from other departments access to the same accounts. So that missing information can be added in the programme and not be lost among letters, folders, and documents.

8. Do you face any difficulties in daily duties with customer relationship activities? (e.g., limitations in tracking and controlling the volume of sales, customer account, opportunities tracking, and etc.)?

One significant drawback that I can identify is limitations on customer overview, manual tracking on customer visit regularity. In case of inquiries from colleagues or other departments about customer activities, it requires manual input and retrieval of information. This also applies to customer enquiries, which sometimes come in quite a lot during the day and can take a long time to deal with as the sales department has to contact other departments to gather the necessary information.

9. Have you experienced significant damage of customers' relationships due to lack of technical support/ missing data in the form of a CRM system?

We haven't experienced significant damage to customer relationships due to the absence of a CRM system. However, there are situations where interaction and information exchange with customers could have gone better and easier with the presence of a CRM system. For example, questions and problems from clients sent to the post office were not solved or answered in a timely manner, which significantly spoils the attitude.

I would also like to mention a frequent problem: information about customers is scattered in different places, and there were cases of inaccurate information about a customer that was incomplete. Without centralised information, it is difficult to keep track of customer interactions.

10. Based on your knowledge and understanding of your company's sales processes do you think CRM system would be beneficial tool?

I believe that this tool should reduce to manage customer information and cooperation within sales team and other departments. Also, CRM will secure knowledge transfer when one Sales manager will change/leave his sales region.

11. Where, in your opinion, should the focus be applied when implementing a CRM system?



My understanding is that it's to provide easy or user-friendly tool with no additional work to maintain this tool. Moreover, I would also emphasise the introduction of a fleet of machinery park, where there would be an overview of the equipment at certain plants. In other words, the sales department would have accurate audit information on the number of printing lines (which formats), cutting machines, gluing lines and other machines and equipment. This information is very important if we are talking about a tender, as the company, and especially the sales managers, would be able to see the data on the technical capabilities of each plant and their locations around the world. At the moment, obtaining data for plant inspections is very time-consuming.

12. How do you think you can benefit from CRM considering the scope of business activities you are responsible for?

CRM as a tool should free up my working time to have all customer data stored in one place with easy access and navigation, with having automatized processes as reporting, time tracking, notifications.

Furthermore, this tool should bring up visibility on all customer actions done, which is important in discussion with your manager.

13. As currently CRM system is not introduced in your company, what are alternative approaches are taking place now? What is alternative to CRM system?

We have automatized customer visit reports in our BI reporting tool.

Using MS Teams enable information sharing/exchange within sales team. This includes storing price lists and customer information files.

14. What specific limitations or boundaries does your company have in place when it comes to implementing a CRM system?

There are a couple of limitations we face. Usually, CRM tools are expensive and securing budgetary approval can be challenging. We know Sales Force is good tool, but our ERP is SAP so there will be difficulties to connect CRM with ERP. Lastly, our ERP system is shared with two business segments, so any CRM system implementation would need to be separated accordingly.

15. What potential fears or concerns does your company have regarding the implementation of a CRM system, and what factors contribute to these apprehensions?

Main concern is that CRM tool will be not accepted or not used by sales team. We have examples of business units where CRM tool is not used, but big budget and efforts has been spent for creation and installation.

16. What would you need/expect from the implementation of CRM?

I believe a successful CRM implementation should involve input from the sales team. Project team should build CRM based on sales team input, best if they will have sales managers in project team. Moreover, tool should be intuitive and user-friendly and also help with daily work and not create extra work for reporting and system feeding.

17. How do you think a CRM system can contribute to the overall growth and success of your business?

In my opinion, CRM system should free up work time of sales managers from administration work to more important tasks and allow them to come to customer visits and negotiations better prepared. Thereby, making these interactions more effective and fruitful.

18. Who else from the company can benefit from implementation of CRM system?

First of all, our marketing department would gain direct access to customer information for their daily work. Additionally, Customer Service and Technical Service Teams also will have access to customer information they serve, enabling them to provide better support and service.

### **Interview answers from Alex P.:**

1. What advantages or disadvantages do you believe CRM has?

From my perspective, CRM offers a significant advantage in separating and centralising information. It allows to have easy access to customer data. CRM enables employees to share customer information between different departures. I would also like to highlight one of the main advantages of working with CRM - all interactions with clients are displayed in one system.

However, I can also highlight a few disadvantages. Firstly, the introduction of CRM will affect the entire work of the department and the company. It will take time and money to adapt to the system and get used to using it. This may result in a change of corporate culture, but this is more of a temporary inconvenience than a permanent one. Over time, the situation in the company may stabilize.

2. Where/How do you store customer information and its related business content?

Customer data is currently dispersed across numerous systems. The primary data is kept in OneDrive's cloud storage. All significant emails, such as correspondence with clients, notes from meetings, and contracts, are kept in email archives.

3. What type of customer database is available for all employees to access and use?

All customer orders are managed via SAP ERP, which gives employees access to customer data. The system holds all the organization's data. The sales department directly utilises one of the system's modules.

4. Do you have customer visit reports? How it looks like? How often do you need to fulfil?

How long does it take to fulfil one report per visit?

We do maintain customer visit reports, but they are not standardised, and they differ in format and content. Each employee personally prepares a report, which includes a detailed summary of the meetings held. It takes from 30 minutes to 1 hour to create a report. It all depends on the duration of the meeting and the involvement of the client. Reports are compiled and distributed via e-mail.

5. What is the approximate time you spend for the following business tasks?

<b>№</b>	<b>Business processes</b>	<b>Description of business process</b>	<b>Approximate time/min.</b>
1	<i>Prices (search, update, review)</i>	Excel file with Price List or overview of last inquires + BI reports	30 minutes
2	<i>Customer information</i>	Personal notes (word file/one notes) on laptop; share files and emails	15-20 minutes
3	<i>Automation park/ technical information per plant</i>	If we collected information – during customer visits and keeping in excel files	Around 10 minutes, however it takes more time for send request to get information from customers if information not available
4	<i>Contracts and annexes (review, update, analysis)</i>	Usually in OneDrive, but also in email	Depends on whether the documents you need are in one place or if you need to look through multiple folders, emails, etc. If it in one place – around 5 minutes If not – around 30-40 minutes
5	<i>Reports</i>	Usually, it is manual work with different data sets	Depends on complexity - 45 minutes
6	<i>Account planning/ Strategic plan</i>	Usually updated several times annually to reflect	It usually takes quite a long time. It can take anywhere

		shifting market conditions and organizational goals	from 100 minutes to 130 minutes, which is several hours to be exact
7	<i>Assigning tasks to other company members</i>	Outlook emails, online calls, MS Teams	10 minutes
8	<i>Opportunities information</i>	Collected from various sources: market research, internal analytics. Stored in personal notes and emails	25 minutes

6. Do you see any potential process optimizations to be applied within the current sales daily activities?

Process standardisation and optimization, in my opinion, will significantly increase productivity. A lot of activities that are done on a regular basis could be optimised, which would make the work much easier. Therefore, I am more inclined to believe that there are many possibilities to optimise processes. One way to do this is to have all your customer information, meeting reports and action statuses in one place.

7. Where do you see potential for digitalization/ automatization (using technology to automate tasks)?

To improve efficiency, digitalisation will play a significant role and can greatly help the sales team to be more productive. I can highlight the automation of lead tracking, follow-up reminders, email, phone and social media marketing, and the creation of personalised customer profiles.

In addition, With the implementation of cfm, I want to see many reports automated and found in one source, so that I don't have to spend time searching for important data. For example, order intake reports, turnover reports, board consumption.

8. Do you face any difficulties in daily duties with customer relationship activities?

(e.g., limitations in tracking and controlling the volume of sales, customer account, opportunities tracking, and etc.)?

I can highlight several limitations. One of the most prominent is the difficulty in getting a complete picture of customer interactions, sales progress, and sales volume control. The majority of the data must be manually located because it is scattered across multiple locations, which greatly reduces efficiency.

9. Have you experienced significant damage of customers' relationships due to lack of technical support/ missing data in the form of a CRM system?

At the moment, the company has not recorded any major damages, but because of the missing information that can be obtained through CRM, it is possible that the business will miss out on a potential customer or sour its relationship with an existing one.

10. Based on your knowledge and understanding of your company's sales processes do you think CRM system would be beneficial tool?

I tend to believe that a CRM system will be a useful tool to enhance customer relations based on the company's sales processes. In this way, the sales department will have easy access to up-to-date customer data, statistics, and reports.

I would imagine having at one glance the information about customer account from different angles. For example, when I would be appointed for specific customer and be fully in charge of it with few clicks I will be able to access following data about this account: account team members both from our side and customer side, possibility of saving attachments, tracking activities, have certain sales data reports, documented changes in the account, customer mapping overview, relationships matrix ( who is decision maker, who is promoter, task executor and etc), and competition status.

11. Where according to your opinion the focus should be applied?

Actually, centralising customer data and automating routine tasks is something to consider when introducing a CRM in the company. We need a tool that will facilitate the work of employees, while increasing the efficiency of communication with customers. Since this will bring a lot of changes to the company, it is worth paying

special attention to effective training in the use of CRM. As failures can occur during implementation, it is particularly important to make the transition gradually.

12. How do you think you can benefit from CRM taking into account the scope of business activities you are responsible for?

CRM should first of all save my personal time spent on work by automating tasks and processes. Additionally, it is important to promote employee engagement and knowledge sharing.\

13. As currently CRM system is not introduced in your company, what are alternative approaches are taking place now? What is alternative to CRM system?

Currently, SAP ERP can be considered an alternative to CRM. However, basically we only get data about customer orders. We have manual record keeping, such as Excel for storing customers' personal information and communicating via email.

14. What specific limitations or boundaries does your company have in place when it comes to implementing a CRM system?

I believe that the company may face budget constraints, as well as the adoption of a new system from employees.

15. What potential fears or concerns does your company have regarding the implementation of a CRM system, and what factors contribute to these apprehensions?

The main concern that I can highlight is the fear that employees will not adapt to the new system, which will lead to the fact that it will not be used.

16. What would you need/expect from the implementation of CRM?

I can give a few expectations of what CRM can bring to company. Firstly, I expect a planned implementation process so that it takes place gradually and each employee adapts to it without any problems. Moreover, the system should be convenient and

practical to use. From the system itself, I would expect improved sales coordination and internal communication, centralized management of customer data, as well as automation and efficiency of the company's sales processes.

17. How do you think a CRM system can contribute to the overall growth and success of your business?

CRM system can significantly contribute to increasing customer satisfaction and improving sales efficiency, which will lead to the overall growth of the company. By introducing a tool like market mapping as a part of CRM, the company (in particular the sales department) will have a more complete picture of the market, taking into account different geographical areas, the number of customers, data on competitors and this information could be uploaded to a centralised system with reference to specific customers. This allows packaging company to develop a more effective sales and competitive strategy. This information is also critical for growth strategy meetings and during company development decisions.

It will be especially easy if the marketing intelligence department provides this information directly to the tool, so that afterwards it is available at any time for all sales staff to obtain information about the share wallet in a specific location. This way we can analyse the information faster and more accurately and build a strategy for working with customers. Ultimately, this also influences further pricing in different regions.

18. Who else from the company can benefit from implementation of CRM system?

Actually, this action will be beneficial to the entire organisation. Other departments, such as marketing and management, can benefit from a CRM system, as there will be access to constantly updated customer information and easier transfer of information between departments. A good opportunity for the technical team is to store project and investment data in one place so that the company can see the number of people involved in a project.



## **Interview answers from Marek M.**

1. What advantages or disadvantages do you believe CRM has?

For the advantages, I would like to emphasise that good CRM System enables proper management of the accounts from first contact, through maintaining and improving relationship, service, till increasing sales through new and cross selling opportunities. Information around client, client contacts & what is going on is readily available in the system, giving overview to anybody who has something to do with the client at any point in time.

However, the disadvantage may be that recording all this information in the system is connected with higher administrative efforts and it has to be recorded consistently to have good data quality and to be always relevant. If, however, maintained properly, it is definitely worth it.

2. Where/How do you store customer information and its related business content?

Currently information is stored in e-mails, messages, minutes from meetings or files on phone or drive. If everybody does his job right all can be found in one place on a shared drive in created folders, which are properly organized and named.

3. What type of customer database is available for all employees to access and use?

Currently a contact list and different files with various relevant information stored on the drive. And we also have access to business intelligence reports, which allows all employees to access customer data.

4. Do you have customer visit reports? How it looks like? How often do you need to fulfil?  
How long does it take to fulfil one report per visit?

There is a template which should be done after every visit, meeting, or online meeting. It is a simple word document saved on drive which every account manager or service personnel should take printed or electronically and fill in after visit. Its more or less a visit checklist. Depending on when it is filled out, if maybe right during the visit or right after, sometimes maybe after couple of days it can take from 30 minutes till 90 minutes.

5. What is the approximate time you spend for the following business tasks?

<b>№</b>	<b>Business processes</b>	<b>Description of business process</b>	<b>Approximate time/min.</b>
1	<i>Prices (search, update, review)</i>	Excel file with Price List or overview of last inquires + BI reports	30-45 minutes
2	<i>Customer information</i>	Information that saved in emails, PC and share files	15 minutes
3	<i>Automation park/ technical information per plant</i>	Usually, information gathered during customer visits and then stored in Excel file	20 min if collected
4	<i>Contracts and annexes (review, update, analysis)</i>	Stored OneDrive, shared folders	15 minutes
5	<i>Reports</i>	BI reports make this possible, but manual intervention is needed	Usually it takes 30-60 minutes: according to how complex the report
6	<i>Account planning/ Strategic plan</i>	Updates typically occur a few times per year.	90-150 minutes
7	<i>Assigning tasks to other company members</i>	Via Microsoft Teams	15 minutes per person
8	<i>Opportunities information</i>	This information is gathered through meetings, brainstorming sessions, analysing industry trends. It is	30 minutes

		stored in emails, folders in x drive and includes customer interaction data	
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6. Do you see any potential process optimizations to be applied within the current sales daily activities?

Of course, a digitalized solution for recording, sharing, processing, acquiring, forwarding the sales information, which you could maybe use even as an app on your phone, which would synchronize online, where you can tag people, assign tasks, have access to documents, would be great.

7. Where do you see potential for digitalization/ automatization (using technology to automate tasks)?

I see several opportunities for digitalization and automation. Firstly, automation tools can streamline downloading, updating, and sharing reports, ensuring access to up-to-date reports. It will also allow notes to be recorded during meetings, improving note-taking efficiency, and creating a centralised repository of information.

Email will also benefit from automation - it will allow you to categorise, archive and extract relevant data from emails, saving you time on email management.

Moreover, the process of collecting and storing contact information will be greatly simplified.

8. Do you face any difficulties in daily duties with customer relationship activities? (e.g., limitations in tracking and controlling the volume of sales, customer account, opportunities tracking, and etc.)?

Currently there is hard to be up to date on what is going on your account especially if more people, business units work with the client. Sometimes I feel there is missing transparency on what is who doing, what was agreed with whom, for which price.

What changed. There is a lot of effort and communication needed to keep up to date or gather all relevant information when preparing for meetings, tenders and so on.

9. Have you experienced significant damage of customers' relationships due to lack of technical support/ missing data in the form of a CRM system?

Luckily not yet, but there was often situation where my answer just had to be "I will double check with my colleagues", which does not look good in front of your customer.

10. Based on your knowledge and understanding of your company's sales processes do you think CRM system would be beneficial tool?

Definitely, this would sure improve the whole process. Especially I would like to emphasise that it could be improved to assign a task to another employee. I usually contact my colleagues via MS Teams and sometimes via email. It takes about 15-20 minutes. However, I have to explain the task, find, and send additional materials, documents and contracts. Assigning tasks through the system would be easier and the amount of time spent would be significantly reduced. In general, if all the information and documents that come from different departments and different geographical locations were in one place and attached to specific customers, so that we don't have to exchange data via email, apps, etc. It would save a lot of time that we spend collecting data, even when it comes to one customer. It would save a lot of time that we spend on data collection, even when it comes to one customer.

11. Where according to your opinion the focus should be applied?

I would start from the basics; we should make sure that all information is stored and readily available in one online solution where information can be gained with few clicks. Then we would have a tool for a complete overview of all contracts related to a certain client. We would be able to see at one glance how many contracts a client has when they expire. In addition, this would also apply to non-disclosure agreements and any important attachments.

12. How do you think you can benefit from CRM taking into account the scope of business activities you are responsible for?

As I need to be aware what is going on by the client and what other people are doing, what are the current prices, what projects, opportunities are being discussed,

sometimes who needs to be contacted to tackle certain issues, having all that on one place would be a great benefit. I also often ask the market intelligence department to provide a report on the current market situation. If all data and market and industry research were linked to customer accounts or business share information and included market mapping in general - it would save a lot of time in obtaining information.

13. As currently CRM system is not introduced in your company, what are alternative approaches are taking place now? What is alternative to CRM system?

Currently our alternative for CRM is Excel lists, shared drives, copying relevant people to e-mail communications so everybody is aware. But to be honest, once a while some information gets lost, file is not saved, some things forgot to be communicated and there is definitely room for improvement and processes need to be rethought.

14. What specific limitations or boundaries does your company have in place when it comes to implementing a CRM system?

Well, first of all its budget & second but not less important the whole change process and change management. But people need to recognize that digital tools are the way forward and am sure there are tools out there in the market which offer good value for money.

15. What potential fears or concerns does your company have regarding the implementation of a CRM system, and what factors contribute to these apprehensions?

Well, it is an IT Project which means integrating new system into current infrastructure, systems, maybe meaning adding new functionalities if you want to have cloud or mobile connectivity. Depending on tool and functionalities it is the costs on one side and then the concern if people will really use it on the other.

16. What would you need/expect from the implementation of CRM?

It definitely would improve cooperation and processes. And I expect that CRM would make my life in daily operations easier.

17. How do you think a CRM system can contribute to the overall growth and success of your business?

I think it's the customer relationship and management leading to better sales but also improving the service for customer and their satisfaction which will contribute to long term stable business.

18. Who else from the company can benefit from implementation of CRM system?

Well, I think everybody can receive some benefits from implementation of CRM - from management till production. Management would have readily information to make their insights and make more informed decisions. Production could use the information from CRM system to improve planning. It would be a good solution for the support team to have direct access to complete customer information and easily retrieve information requested by the customer. For example, data on stock overruns or complete customer account information.

I think the benefits would not be just by sales in their day-to-day business.

## **Interview answers from Maria M.**

1. What advantages or disadvantages do you believe CRM has?

I would say the main advantages are related to the usage of the tool itself and how efficient you can be in certain fields of daily business activities.

For example, customer information that can be linked between your internal companies software and additional information about customer facts & figures which can be added in order to have full overview of the customer account. So, CRM is not like customer contact book, but rather matrix of information, relationships, and additional business information for each particular customer account. Also, I guess one of the biggest advantages is that CRM tool can be shaped for the needs of the particular company. By having basic CRM set up there is possibility to have additional fields like data about competition, market mapping, contacts, machinery park and etc. The tool can be designed for the specific needs of the industry where company is operating.

2. Where/How do you store customer information and its related business content?

Usually, it is either part of account strategy plan document or some information is split into several folders/ programs: One note, Excel files, Emails, Word documents. When it comes to Account plan document there is information about customer share, its competition, organizational matrix and SWOT analysis. Or it can be the case when the information spread into different folders locations, partially outdated or simply not existed. As this process is not optimized centrally within company on the group level, each sales manager can have it in his/her own way and present to management on the demand or update when it is needed.

3. What type of customer database is available for all employees to access and use?

The customer database can be only extracted from GRE system via invoice report. Meaning if we sell our products to particular customer, which is registered in the system, it is visible via sales reports. When we speak about gathering some additional information about customer, it usually sorted as part of account planning document or just in some personal note of each sales representative.

4. Do you have customer visit reports? How it looks like? How often do you need to fulfil?

How long does it take to fulfil one report per visit?

No, usually visit report is kind of the summary that is shared internally within the team or with manager, and externally with customer. Also, not after each customer visit there is extended summary of actions and agreements are made. Every customer visit has free form and depending on sales manager written in its specific way. Some summaries are more detailed, than others.

If the purpose of the customer visit was, for example, quarter business review where many parameters of business are discussed – then it can be up 1-2 hours to prepare proper summary after visit reports. Once it is ready to send it per email to internal stakeholders and afterwards save it somewhere in the folder or share folder (depending on each person and how key account manager is organizing her/his data management.

5. What is the approximate time you spend for the following business tasks?

<b>№</b>	<b>Business processes</b>	<b>Description of business process</b>	<b>Approximate time/min.</b>
1	<i>Prices (search, update, review)</i>	Excel file with Price List or overview of last inquires; reports	20-30 min
2	<i>Customer information</i>	OneNote at my PC; information saved on the folders and share files; some archive emails	30 min
3	<i>Automation park/ technical information per plant</i>	Usually, information gathered during customer visits and then stored in Excel file,	5-10 min if collected, if not available- then it takes up to few hours to send request and get information from the plant



		pdfs, or power points presentation of factories.	
4	<i>Contracts and annexes (review, update, analysis)</i>	With some customers just agreements per email, majority of cases in excel format in the folders on Xdrive disk	5-10 min if simple update or stored at the folder, more time needed in case of several agreements for one customer: one contract in email, second in some archive folder
5	<i>Reports</i>	Excel and BI reports for sales are mainly used	10-60 min - depending on complexity of reporting
6	<i>Account planning/ Strategic plan</i>	Usually updated few times per year	It can take up for few hours to create content and then update on the request when there is new information to add or occasionally to present to the management, very time consuming to create content (gather info from different sources and then customized it properly)
7	<i>Assigning tasks to other company members</i>	Via MS Teams chats or call and emails	5-10 min per email
8	<i>Opportunities information</i>	Data is collected from several sources, for example - during customer interactions, the company's social media page and the company's website. Stored via email and different folders on Xdrive	10-20min

6. Do you see any potential process optimizations to be applied within the current sales daily activities?

Definitely I see huge potential for improvement, especially the way how and where we store different type of information about customer “world”, how quickly it accessible and how we use it - to full extent or in very limited way. When speaking about basic features of CRM system I would highlight visits reports, contacts - having full overview for customer account, sales report that can be generated based on the existing data in CRM tool. For example, when you tried to have new business contact, had first meeting, presented your product to potential customer but unfortunately was not qualified for further business negotiation. By having such sales path analysis in place, it would be much easier to track historical development and also understand what went wrong at the certain stage.

We had also the cases when several employees from our company contacted the same potential customer just because we don't have common tool to track whom we visited for potential business and what was the outcome. Or the situations when we quoted for the business, but new customer declined the offer due to some reasons and few years later we have exactly the same situation with that customer. By having historical background stored in one place we would know what the reasons was of declining the offer and would adjust accordingly in the future. I believe CRM is more than the tool that can offer certain features but rather the tool which helps business to run and develop further.

Competitor section must have for CRM, cause now I use some data which usually get unregularly form marketing intelligence, or rely on the account strategy plan doc which was developed by my previous colleagues with certain limitation in transparent information.

It would be also helpful to have overview of all technical capabilities per each plant as part of CRM. When it comes to having a tender, it takes a lot of time to make internal overview for which plants that business could be assigned when the location is playing secondary role. Machine Park overview would allow sales manager to see at one glance, which type of machine is available, how many printing machines, gluing lines, die cuttings, riveting systems and etc is available per particular plant.

In addition, via such tool it is possible to assign tasks to another employee. And once the employee opens the task it has all overview of relevant docs which need to be used to accomplish task.

Contract information can be part of this document overview which can be stored in CRM tool. By linking to correct customer in few clicks you have full overview when some contracts are about to expired. Especially with some global customers it can be the case that we have several contracts with each factory we supplied to from our different plants.

Market mapping would be another feature that could be added into future CRM tool and broadly used, for example when we need to identify our share per specific customer and market. With additional support of information from marketing intelligence, the market mapping information would tell us how big the customer in specific region and what share is distributed to us, how big potential we have in terms of increasing allocation of current business portfolio.

7. Where do you see potential for digitalization/ automatization (using technology to automate tasks)?

As already mentioned, sales reports, assigning tasks, having customer information in one place that would provide full overview.

Definitely automatized sales reports that would combine ERP system and customer information manually entered into the tool. For example, if I want to have full status quo about particular customer in few clicks I would receive full portfolio of customer related information: like order intake from ERP, latest visits, what happened per last tender quotations, which machinery park is now involved, what is competition situation around this customer and etc.

8. Do you face any difficulties in daily duties with customer relationship activities? (e.g., limitations in tracking and controlling the volume of sales, customer account, opportunities tracking, and etc.)?

Currently would highlight following limitations: different information related to one customer is stored in dif. places, not single source to get full overview about customer. No visit reports or made irregular and usually shared per email and overtime it lost.

Delegation function through the digital system in case colleague is sick via the system alternative colleague can get full access into customer data. Technical capabilities of machinery park for all plants to be stored in one system. Sales path tracking map, how many new customers have been contacted, with which of them managed to get to trials and negotiations. Competition overview to be linked to specific customer which would operate in specific industry, so be able to link marketing intelligence study and real input knowledge of colleagues in one place.

9. Have you experienced significant damage of customers' relationships due to lack of technical support/ missing data in the form of a CRM system?

Hard to say, but probably we would be quicker in terms of providing information to customer, internal exchange about customer portfolio would be simplified and quicker. We would have better overview about "customer world" and linking internal systems are always beneficial in terms of optimizing the processes.

10. Based on your knowledge and understanding of your company's sales processes do you think CRM system would be beneficial tool?

Yes, I think I already mentioned in previous questions where particular I personally see big input having CRM. To summarize, it would bring proper management into customer information pool that colleagues can use and gain knowledge not only what happened in past but also use the information to shape future. A part of it, digitalization of certain functions and internal process are always beneficial and time optimizing factor. Again, on the recent example, one of the colleagues left company after leading for several years global account – the entire his knowledge was basically gone- because of we had to collect information by pieces and spent a lot of time on gathering back information.

11. Where according to your opinion the focus should be applied?

So let me summarize what I already mentioned earlier. In my personal opinions, "must haves" are customer account information, visits, reports, tasks, competitors, delegates, machinery parks, market All calls and emails are displayed in the accounts linked to them, with information about the subject, status and originator of the email or phone call.

During calls, you can write notes, which will also be displayed in the CRM in order not to miss important points that were identified during negotiations.

For emails, you can select which of them are more important, to which category the emails belong. At the same time, it is very important to have it in user friendly way, easy to fill in information and easy to extract. Be able to access data not only via laptop but also via phone.

12. How do you think you can benefit from CRM taking into account the scope of business activities you are responsible for?

As EKAM I will definitely benefit that all customer related data stored in one place, it will give opportunity to update information in one tool, not having different sources of data which I need to update and review on regular basis. Having in one place combination of manually entered data and internal system will give me broad spectrum of data to extract in easy and reliable way.

13. As currently CRM system is not introduced in your company, what are alternative approaches are taking place now? What is alternative to CRM system?

Well for each requite we found semi-manual solution, for example for visit reports we create manual reports about customer visits- usually shared per email and not regularly. MS Teams channel for sharing additional information about customers, or via emails. Price lists, contracts and some manual sales reports are stored in One Drive disk and in some other internal folders.

14. What specific limitations or boundaries does your company have in place when it comes to implementing a CRM system?

I believe main challenge that it quite expensive tool and requires certain budget approval on group level. Then implementation and collecting all requirements taking up to 2 years until it can be used and functioned fully not only in HQ but also in all plants and different countries where we have offices. There can be also challenge of connecting our internal database system with CRM, maintaining, and updating the systems.

15. What potential fears or concerns does your company have regarding the implementation of a CRM system, and what factors contribute to these apprehensions?

I guess the main concern that in order to have CRM system in place, it is essential to have some basic operations running and some manual reports already in action. Meaning that there is sufficient background and some simplified level of digitalization already existing in company. If for example we want to have visit reports in CRM tool, then we should have some manual visit reports in place and in usage, so our simplified reports will be used as a base for CRM visit reports.

16. What would you need/expect from the implementation of CRM?

Tool that would simplify the daily operational activities, updating regularly and if require to enter manual data it will be understandable from the first look and of course user friendly.

17. How do you think a CRM system can contribute to the overall growth and success of your business?

I guess the linkage can be done via how much information CRM tool stores about customer and how sales can use this data in order to affect future negotiations, or on daily basis how CRM functions can be used to deliver service to customers.

18. Who else from the company can benefit from implementation of CRM system?

Many departments and different functioned teams. Marketing intelligence will use CRM and their assigned fields to provide latest news about industry where customer is operated and how eventually it can affect market and etc. New business development team will use visit reports data and sales path comments in order to analyse how many customers were entered as prospects, which of them turned to be real business opportunity, which failed on the stage of trials or negotiations, and which succeeded to get first sales order. Top Management will get overview of latest customer's visits and what had been discussed and agreed. Tender team would benefit by having better overview of machinery park when making an offer to customers where their products should be manufactured.

