

2023

Managing Change and Organizational Resources When Implementing Customer Relationship Management Systems

Stephanie M. Spears
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Walden University

College of Management and Human Potential

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Stephanie M. Spears

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Walden University
2023

Abstract

Managing Change and Organizational Resources When Implementing Customer
Relationship Management Systems

by

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MBA, DePaul University, 2010

MA, DePaul University, 2003

BA, Spelman College, 1994

Doctoral Study Submitted in Partial Fulfillment
of the Requirements for the Degree of
Doctor of Business Administration

Walden University

August 2023

Abstract

Many customer relationship management (CRM) projects fail to produce the desired outcomes. Failed CRM projects negatively impacts operational efficiency, data-driven decision-making, scalability, financial performance, compliance, and customer service. Grounded in Kotter's 8-step change management model, the purpose of this qualitative multiple case study was to explore strategies firm leaders used to manage change and organizational resources when implementing CRM. The participants included five business-to-business firm leaders working for small or medium-sized enterprises within Texas who used strategies to manage change and organizational resources when implementing CRM. Data were collected through semistructured interviews and document analysis. The data were analyzed using thematic analysis, which yielded four themes: secure executive sponsorship and management buy-in; secure critical resources; adopt a change management framework; and measure adoption, system utilization, and performance. A key recommendation is contract implementation partners to assist internal CRM project administrators in managing organizational change and resourcing when implementing CRM. Implications for positive social change include the potential to improve resource utilization and economic growth by having CRM users focus on activities that add value, such as building customer relationships and solving problems.

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Dedication

I dedicate this doctoral research to my late grandfather, Fred Ross. He taught me to persevere no matter the difficulty, have integrity, laugh a lot and even at a few people, and be a continuous learner. I also dedicate this research to my 96-year-old grandmother, Nona Ross, who taught me the importance of discipline and saying no, and to my mother, who taught me resilience and kindness. I also dedicate this research to the world's greatest boss and servant leader, Duane Anderson, for supporting my career and continued educational journey. I bestow my greatest debt to my biggest supporter, research partner, and husband, Alan Spears, who kept me motivated, hydrated, rested, fed, uplifted, renewed, and enlightened throughout this doctoral journey. I attribute these extra pounds to his nurturing, exceptional barbecue smoking technique, and Al's Famous sauce. Both our names should be on this degree.

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Section 1: Foundation of the Study

The COVID-19 pandemic motivated sales leaders to come up with new strategies for assisting sales professionals in prospecting, selling, and provisioning services with less in-person customer contact. Customer access is essential for obtaining critical customer information to build and maintain valued relationships (Badrinarayanan et al., 2019). In today's economy, customer relationship management (CRM) is an indispensable and powerful IT-based technology solution firms use to manage customer-related information and relationships (Jager, 2021; Shukla & Pattnaik, 2019). Faced with low-touch sales conditions, evolving customer demands, and increased competition, firms are changing how they use CRM systems to form personal connections with customers (Ngo & Vu, 2021). In a global environment, firm leaders search for ways to help build and manage customer relationships.

Background of the Problem

Although CRM is not a novel system, process, or tool, CRM spending is trending upward, with analysts anticipating it will reach USD 80 billion in sales by 2025 (Grand View Research, 2021). Despite firms' significant investment in CRM, Deshmukh et al. (2020) estimated that 60 to 80% of CRM projects fail. Several factors impede organizations from achieving the full potential of CRM, such as mismanagement (Deshmukh et al., 2020), underutilization (Azhakaraja, 2020), lack of momentum (Kotter et al., 2004), and lack of full integration into business practices (Chen et al., 2021; Jager, 2021). In the postadoption stage, many firms experience poor integration of the CRM system into organizational processes and sporadic use among employees (Chen et

al., 2020). In the United States and Europe, only 12% of firms are using CRM productively (Tazkarji & Stafford, 2020).

Problem Statement

Approximately 90% of CRM projects fail to meet client expectations (Chen et al., 2020). The CRM service industry's anticipated 8.2% annualized contribution to the U.S. economy is much higher than the anticipated growth of the gross domestic product (IBISWorld, 2022); nonetheless, the probability of success remains low (Hallikainen et al., 2020; Ngo & Vu, 2021). The general business problem is that firm leaders often experience challenges managing change and orchestrating organizational resources to integrate CRM into overall operations, resulting in failed CRM initiatives. The specific business problem is that some firm leaders lack strategies to manage change and organizational resources when implementing CRM systems.

Purpose Statement

The purpose of qualitative multiple case study was to explore strategies that firm leaders used to manage change and organizational resources when implementing CRM. The targeted population was business-to-business (B2B) firm leaders working for small or medium-sized enterprises (SMEs) within Texas who used strategies to manage change and organizational resources when implementing CRM. The findings from this study may have a positive effect on social change in SMEs because improved CRM use may lead to new business prospects and affect sales orders and, thus, firm revenue. As a result, firms might have extra money to increase involvement in local corporate social responsibility (CSR) programs that positively impact the local economy and communities.

Nature of the Study

A qualitative approach was appropriate for this study because researchers seek in-depth understandings and insights into business leaders' activities and decisions relative to a contemporary problem (Saunders et al., 2016). With qualitative studies, researchers build a rapport with study participants to interpret participants' perceptions, experiences, and activities (Saunders et al., 2016). In addition, for qualitative research, all research participants should be qualified to serve as key informants and be able to share their experiences as organizational leaders (Lanka et al., 2021). I was more interested in the diversity of firm leaders' first-hand descriptions, stories, and interpretations, without inadvertently manipulating their input, than in capturing objective statistical data. Thus, a quantitative research method was not appropriate for this research because it does not lend itself to an in-depth exploratory study of the research question (see Lanka et al., 2021). Also, I did not test hypotheses, and the research question did not necessitate comparing or measuring variables. According to Saunders et al. (2016) and Yin (2018), a mixed-method approach combines qualitative and quantitative methodologies. As defined by Lanka et al., a mixed-method approach consists of integrated qualitative and quantitative components. Therefore, a mixed-method approach was not suitable for this study.

I explored ethnography, phenomenology design, and case studies for the research design. Ethnography concerns the study of people, culture, and the interaction of the two (Merriam & Tisdell, 2016). I did not study the cultural experience of any group, so ethnography was inappropriate. Phenomenology concerns the shared nature of a lived

experience among a particular group concerning a specific concept (Englander, 2019). As I did not intend to share the lived experiences of a group, a phenomenological design was inappropriate. To address the research question in this qualitative study, I used an exploratory multiple case study as the research design. The case study method was appropriate because researchers focus on a contemporary phenomenon or case, which merits a detailed description instead of a historical event or phenomenon (Yin, 2018). The researcher does not need control over behavioral events; instead, they rely on cognitive access to data and information that study participants verbally share during interviews and other observable factors of interest (Yin, 2018). With the exploratory case study design, researchers can change course based on new data or information obtained to better comprehend why a phenomenon occurs (Saunders et al., 2016). With the multiple case study methodology, researchers can replicate and compare across diverse organizations or analytical units (Saunders et al., 2016). Because the research questions were neither critical nor unique, a single case study approach was inapplicable (see Saunders et al., 2016).

Research Question

What strategies do firm leaders use to manage change and organizational resources when implementing CRM?

Interview Questions

The following interview questions supported the central research question:

1. What strategies do you use to manage change and organizational resources when implementing CRM?

2. What strategies were the most effective in managing change and organizational resources when implementing CRM?
3. What strategies were the least effective in managing change and organizational resources when implementing CRM?
4. What were some of the key challenges you experienced when implementing CRM?
5. How did you identify and address major challenges when implementing CRM?
6. What additional information would you like to share about your strategies for managing change and organizational resources when implementing CRM?

Conceptual Framework

The theory that grounded this study was Kotter's 8-step change management model. Kotter (1996) identified eight steps for achieving organizational change management success, which winning firms employ:

Step 1: Create a sense of urgency

Step 2: Build/form the guiding team/coalition

Step 3: Create the vision, strategies, and initiatives

Step 4: Convey the vision and strategy to managers, employees, and stakeholders to obtain buy-in

Step 5: Empower others to action

Step 6: Create short-term wins

Step 7: Don't let up; sustain momentum and acceleration

Step 8: Make change stick (i.e., incorporate changes into the culture)

Like other change models, Kotter's traditional model includes a vision for what the organization intends to accomplish and a process to motivate individuals to change their behavior (Pregmark, 2022). For large-scale change initiatives, Kotter's model addresses employee resistance as a significant obstacle and the leaders' role in persuading the organization to shift to achieve an organization's desired outcome (Kotter et al., 2004; Pregmark, 2022). According to Bose (2020), Kotter highlighted how leaders share the vision with employees, how employees participate in the entire change process, and the significance of motivating employees to achieve short-term successes.

The logical connection between the framework presented and the nature of my study included how the theoretical construct steps helped me explore how firm leaders predicted whether employees would adopt a technology, what motivated them to use and embrace it, and what adoption meant to users. Exploring the strategies leaders used to manage change and organizational resources when implementing CRM or any technological system was more complex than exploring traditional versus contemporary theories, choosing between theories or models from various fields, or selecting a widely accepted theory. My research question prompted me to investigate theories, models, constructs, and frameworks researchers used to explore how business leaders motivate employees or address employee resistance before investing in large-scale, organization-wide system projects. I sought to examine process-related theories and models that

reflected the dynamic and competitive business environment, consider stakeholders' feelings and opinions, and provide a road map for driving and sustaining change.

Operational Definitions

Business intelligence: BI includes applications, infrastructure, tools, and processes essential for decision making (Crosthwaite & Sittrop, 2021).

CRM system: CRM is an IT software tool that marketing and sales professionals use for innovation and knowledge sharing (Arnett et al., 2021). The purpose of a CRM system is to provide a method, process, people, and knowledge management repository that organizations use to achieve greater effectiveness in managing end-to-end customer relationships (Batista et al., 2020; Deshmukh et al., 2020) and increase revenue through long-term relationships (Arli et al., 2018).

Knowledge management: Knowledge management includes acquiring, sharing, managing, and applying an organization's proprietary customer assets (Migdadi, 2020).

Assumptions, Limitations, and Delimitations

Assumptions

Researchers must identify any assumptions, limitations, or delimitations that may impact how readers interpret or perceive their research, particularly given the controversy among researchers regarding the quality of qualitative research (Sebele-Mpofu, 2020).

Assumptions are the conceivable decisions researchers make (e.g., about human knowledge, certain realities, or how their values may influence their research) that affect their research process, whether consciously or unconsciously (Saunders et al., 2016). For this study, I assumed that the participants' responses would not differ if I conducted the

interviews in person versus virtually. I also assumed that the participants understood the interview questions and answered honestly and ethically.

Limitations

All research has inherent limitations and weaknesses that could affect the study results (Saunders et al., 2016). Identifying problems or deficiencies and reflecting on the study's limitations are essential for improving research quality and credibility (Sim et al., 2018). One study limitation was that I collected data via interviews with SME firm leaders in Texas, which may not be generalizable to firms in other sized organizations and geographic markets. An additional limitation might stem from firms' chosen CRM systems, the system design, usability, whether system use is mandatory if the system is current, and whether employees receive rewards or punishments for postimplementation system use. Last, leaders' oversight of employees' CRM use may vary in how leaders perceive, interpret, and communicate their observations. Some challenges included gaining access to leaders, avoiding scope creep, and determining what data were vital and relevant to research. Additional challenges included the time allocated for research and the fallacy of equating high CRM system use with productivity.

Delimitations

Research delimitations refer to the scope (i.e., factors and research components), boundaries, and limits the researcher sets so their study's objectives do not become impossible to accomplish (Theofanidis & Fountouki, 2018). The targeted population consisted of B2B firm leaders working for SMEs within Texas who used strategies to manage change and organizational resources when implementing CRM. Thus,

delimitations included the study participants being solely firm leaders with direct responsibility for employees who use CRM. Those firms had to be within the geographical boundary of Texas. Additional delimitations included leaders who managed employees who used CRM and that data collection occurred via virtual interviews.

Significance of the Study

Implementing a CRM system requires organizational commitment, change management competencies, an understanding of business risks, and the orchestration and integration of people, processes, and technology (Batista et al., 2020; Crosthwaite & Sittrop, 2021). Firm-level CRM implementation challenges permeate extant literature as if CRM is a quick-fix technology that employees will embrace regardless of system complexity, training barriers, time constraints, or change resistance. Business leaders may use the study's findings to develop effective strategies to manage change and organizational resources when implementing CRM. They may also use the results to gain a stronger sense of effective approaches and factors for managing change and organizational resources to implement CRM.

Contribution to Business Practice

Understanding and diagnosing workplace motivation is a complex topic (L. Koziol & M. Koziol, 2020; Zang et al., 2020). When coupled with technology implementations (i.e., CRM), organizational change management is vital to employees' perceived usefulness, adoption, and productive use of complex and ubiquitous CRM tools. The findings of this study may provide firm leaders with valuable insights into research related to CRM implementations, behaviors, and performance, as well as change

management. As organizations use various CRM features to meet the modern buyer's expectations (Dover & Peterson, 2020), firm leaders should be aware of effective strategies to reduce employees' resistance.

Implications for Social Change

The findings from this study may have a positive effect on social change in SMEs because improved CRM system use may lead to new business prospects and affect sales orders and, thus, firm revenue. As a result, firms might have extra money to increase involvement in local CSR programs, like offering employees a quarterly paid week of service, funding paid internships for local high school and college students, and collaborating with local community organizations to provide low-income residents or single parents with free online career training. Firm leaders should have more time and resources to devote to focusing on increasing firm engagement in programs that help the local economy.

A Review of the Professional and Academic Literature

There is limited to no argument about whether CRM is an essential business tool supporting employees' critical customer-specific tasks. However, 50% of organizations have been unable to implement CRM (Meena & Sahu, 2021), partly because employees resist adopting CRM (Aydin & Akyollu, 2021; Batista et al., 2020) successfully. The CRM failure rates are concerning, given the investments businesses have made in CRM systems and the vast amount of data they must analyze to meet customer expectations. If firm leaders have a better grasp of the factors that influence system implementation, adoption, and use, they could reduce the probability of users rejecting CRM. Firm

leaders' ability to inspire employees is essential to anticipating and overcoming resistance and ensuring organizational resources can garner customer loyalty and improve performance (Gaur & Afaq, 2020).

The literature review provides insight into scholars' studies on leaders' strategies to manage change and organizational resources when implementing CRM. The total number of references in the study was 112, of which 88% were from peer-reviewed sources, and authors published 83% within 5 years of my expected graduation. References included journal articles, dissertations, doctoral studies, government websites, and books. This review covers a critical analysis and synthesis of literature related to the conceptual framework used for the study and CRM-specific research. Most of the literature was peer-reviewed articles, seminal papers, scholarly journals, and books. Refer to **Table 1** for a summary of the articles.

Table 1

Summary Statistics of Research Articles Used in This Study

Description	Number	Percent of total
References used that were 5 years old or less	94	83%
References used that were not 5 years old or less	19	17%
References older than 5 years that were seminal	8	7%
Peer-reviewed references	99	88%
Non peer-reviewed references	14	12%
Total references used in the study	113	

I used the Walden University Library, Business Source Complete, ABI/INFORM Collection, Academic Search Complete, APA PsycInfo, Emerald Insight, Taylor & Francis, Complementary Index, SocINDEX with Full Text, ScholarWorks, and Google scholar for this study. I searched key terms relating to CRM, such as *CRM*, *CRM implementation*, *CRM software*, *CRM leadership*, *CRM culture*, *CRM capabilities*, *CRM practices*, and *CRM project failure*. I also searched for terms relating to technology adoption, such as *resistance to change*, *user resistance*, *readiness to change*, *IT implementation*, *IT adoption*, and *IS implementation*. Last, I searched for terms related to change management, such as *change management*, *Kotter's 8-step change management model*, *status quo bias*, *customer retention*, *customer acquisition*, and *employee satisfaction*. I organized the literature review by major themes germane to my research question: CRM evolution and definition, research trends, creating a climate for change, engaging the entire organization for change, and implementing and sustaining change using a change management model. These significant themes led me to use Kotter's 8-step change management model as my study's conceptual framework/lens.

I approached the literature review by stating the purpose statement and providing a chronological overview of CRM tracing its intellectual progression. I then narrowed the discourse to key themes that supported the research question, describing how the conceptual framework informed how I investigated the research problem. I concluded the literature review by identifying opportunities for future research. This qualitative multiple case study explored strategies firm leaders used to manage change and organizational resources when implementing CRM.

With the volume, speed, and scope of technology transformations, employees want assurance that CRM will not be another useless, overly complex, and cumbersome tool deployed in isolation by a single department (Nguyen et al., 2020). For employees who acquiesce because of corporate mandates or out of fear of punishment, CRM may become a de-motivator and burden that leads to increased administrative tasks (L. Koziol & M. Koziol, 2020). Kotter et al. (2004) warned leaders not to shove significant projects down employees' throats but to prepare the organization. Organizational preparation, a key component of organizational change, entails firm leaders anticipating and chipping away at severe barriers to improvement before implementing change by inquiring, observing, engaging, and encouraging team members. Organizational preparedness also encompasses aligning the organizational structure and business processes around CRM users, communicating a vision and intended outcomes, and sharing CRM benefits.

Implications for Social Change

The findings from this study may have a positive effect on social change in SMEs because improved CRM implementation and use may lead to new business prospects and affect sales orders and, thus, firm revenue. As a result, firms might have extra money to increase involvement in local CSR programs like offering employees a quarterly paid week of service, funding paid internships for local high school and college students and collaborating with local community organizations to provide low-income residents or single parents with free online career training. Firm leaders should have more time and resources to devote to focusing on increasing firm engagement in programs that help the local economy.

The Evolution of Customer Relationship Management

Managing customer data, a crucial role in marketing and sales operations, is imperative for building long-term, sustainable customer relationships (Ilaio & Pingrey, 2021). Since the 1950s, beginning with the invention of the Rolodex that lived on office desks, business executives have been searching for ways to capture, manage, and analyze customer data to improve customer relationships (Ilaio & Pingrey, 2021). In the 1960s, companies began digitizing the growing amount of customer information they once stored on handwritten Rolodexes. In the late 1980s, manufacturing companies began using the ACT software database to manage customer data (Ilaio & Pingrey, 2021). Over time, building customer relationships and managing customer data evolved into a strategic business operations process resulting in firms selecting profitable customers and determining how to gain insight into customer needs.

In 1993, Tom Siebel, the founder of Siebel Systems, coined the three-letter acronym CRM for business (Buttle, 2009). In 1997, CRM emerged in academics (Labus & Stone, 2010). Researchers still today debate over appropriate CRM definitions and CRM's value (Shukla & Pattnaik, 2019). Since the late 1990s, many researchers and practitioners have posed various CRM definitions and have attempted to articulate its primary focus, but CRM is still unclear (Azhakaraja, 2020).

In 2010, Greenberg defined CRM and its successor CRM 2.0, which modernizes CRM with the addition of social technologies as a philosophy and business strategy supported by technology that aims to enhance business and customer interactions. Greenberg's reference to philosophy alludes to CRM's purpose and value, which

management and information science scholars debate. The strategy component of Greenberg's CRM definition and Shukla and Pattnaik's (2019) refers to how businesses rely on CRM for processes and tactics to retain customers. Contemporary firms no longer view CRM as just an IT-based tool. Shukla and Pattnaik conceptualized CRM as a mature concept and strategic indulgence that combine strategy, tactics, and technology. Greenberg and Shukla and Pattnaik identified a need to continually incorporate social media into CRM to make CRM relevant and dynamic and enhance customer experiences. Unlike Greenberg's definition, which was limited to the business environment, Shukla and Pattnaik's contemporary CRM description encompassed the entire economy.

Notwithstanding the ongoing debate over CRM's definition and effectiveness, researchers have agreed that CRM's purpose is to assist businesses in managing customer relationships and interactions (Al-Weshah et al., 2019; Greenberg, 2010; Shukla & Pattnaik, 2019; Wang & Lien, 2019). Like Greenberg (2010) and Shukla and Pattnaik (2019), Al-Weshah et al. (2019) described CRM as a business management strategy and process for managing customer relationships, yet they took it a step further. Al-Weshah et al. envisioned businesses utilizing CRM to introduce new and innovative products and services to cater to existing customers and appeal to new ones. Wang and Lien (2019) conceptualized CRM as the most popular component of an enterprise information system, which includes five information systems: CRM, enterprise resource planning (ERP), supply chain management, product data management, and business intelligence and analytics. However, according to Wang and Lien, CRM is the only

Executive Information System component whose main objective is to help marketing and sales personnel manage customers.

As an enterprise information tool, Gaur and Afaq (2020) defined modern CRM as the convergence of customer relationship marketing strategies, customer data management, and crucial CRM technologies integrated with multiple data sources. CRM plays a pivotal role in ensuring that a company's customer service, marketing, and sales departments collaborate for the benefit of customers (Gaur & Afaq, 2020). Lastly, Batista et al. (2020) provided a comprehensive, modern viewpoint of CRM: "[T]he strategic use of information, processes, technology, and people to manage the customer relationships with the firm" (p. 496). CRM definitions and conceptualizations have been evolving since CRM's inception. Selected authors have also covered numerous research topics, such as the CRM approach, culture, benefits, implementation, and postimplementation challenges in various industries and markets.

CRM Research Trends

Some of the critical concepts prevalent in recent CRM research include using CRM to improve customer satisfaction, the adverse effects of CRM usage, CRM's impact on business innovation and processes, CRM project failure with limited focus on successful implementations, top management support, organizing around CRM, CRM implementation, and CRM usefulness. In the following sections, I expand on these concepts beginning with a high-level tabular summary of literature reviews in **Table 2** and **Table 3**.

Table 2*Summary of Relevant CRM Research Trends From 1999 to 2020*

Period			Literature review			
Start date	End date	No. of years	Subject	No. of articles	Researcher	Key classifications or themes
2007	2016	9	CRM trends	56	Sota et al. (2018)	Refer to Table 4
2000	2020	20	CRM failure	104	Meena and Sahu (2021)	Refer to the note below the table
2015	2019	4	CRM impact on business innovation	17	Guerola-Navarro et al. (2021a)	Customer retention and process innovation Context,
1999	2019	20	Adverse effects of CRM usage	159	Nguyen et al. (2020)	interventions, mechanisms, and outcomes
Total				336		

Note. The following key themes and examples apply to Sota et al.'s (2018) literature review. CRM context: weak strategy and support, poor application, lack of focus on developing long-term customer relationships. CRM interventions (psychological drivers): Unfairness, distrust, opportunism, lack of transparency. CRM mechanisms (B2B and B2C): negative word-of-mouth, complaints, revenge, anger, conflicts, failures, relationship termination, and lawsuits. CRM outcomes (critical issues): unclear strategy and governance, sales-focused instead of customer-focused, conscious capitalism (purpose should transcend profitability).

Table 3*Summary of Key Findings*

Subject	Researcher	Key findings
Adverse effects of CRM	Nguyen et al. (2020)	The authors created a conceptual model showing how CRM outcomes (i.e., success or failure) are contingent on implementation contexts, interventions, and mechanisms.
CRM failure	Meena & Sahu (2021)	CRM's popularity increased in data mining, software, technology management, knowledge management, artificial intelligence, and knowledge management. The frequency of technology variables in studies decreased. Literature focused more on CRM strategy and management (56%) than technology (13%).
CRM trends	Sota et al. (2018)	The authors classified 58.82% of the articles under customer retention and 64.71% under process innovation. Studies lacked conceptual and qualitative research and did not keep pace with CRM's popularity.
CRM impact on business innovation	Guerola-Navarro et al. (2021a)	Most of the joint CRM and innovation papers focused on helping companies use CRM to retain customers.

CRM Benefits: 2007 to 2016

Over the years, many scholars have analyzed CRM literature. Sota et al. (2018) attempted a literature review of CRM studies from 2007 to 2016, analyzing 56 papers from 10 scholarly marketing journals with 4,633 citations. Sota et al. conducted the review to analyze CRM trends and, as a result, categorized 21 of the 56 CRM studies as

loyalty program-related instead of information technology. The prominence of customer loyalty programs in CRM literature may reveal a shift from CRM evolution, antecedents, definitions, processes, and technology to research geared toward helping marketers understand how to leverage CRM to help maintain customer loyalty to retain customers. According to Sota et al., CRM studies from 2007 to 2016 lacked conceptual and qualitative research and did not keep pace with CRM's popularity.

CRM Classifications: 2000 to 2020

Motivated to understand CRM's high failure rate, Meena and Sahu (2021) searched for relevant, peer-reviewed CRM articles from 2000 to 2020. The authors classified 104 papers identifying significant themes, the most and least researched areas, gaps, and trends. Meena and Sahu organized papers by study type, source, year, country, data collection type and tools, and industry. **Table 4** includes a synopsis of Meena and Sahu's classifications.

Table 4*Meena and Sahu's (2021) CRM Research: Key Classifications*

Key classification	Finding
Top publication year:	2020 (15% of the articles)
Top publication:	Journals (95%)
Top location of publication:	India (20%) The United States (15%) The United Kingdom (7%)
Top three industries:	Insurance (24%), banking (22%), financial services (11%), and tourism and hospitality (11%)
Most prevalent types of papers:	Cause and effect empirical papers (42%) Conceptual studies (37%)
The least prevalent types of papers:	Case studies (2%) Descriptive studies (3%)
The most popular source of data:	Questionnaires (78%) Interviews (19%)
The least popular source of data:	Focused groups (1%) Group discussions (1%)
Top methodology:	Structural equation modeling (13%) Cronbach alpha (12%) Correlation (9%)

Based on the articles in the review, CRM's popularity increased in data mining, software, technology management, knowledge management, artificial intelligence, and knowledge management. Despite the slight increase in CRM technology-related research, the frequency of technology variables in studies decreased. As such, researchers and academics are more laser-focused on CRM strategy and management (56%) than

technology (13%), evident by the number of variables that fall under strategy and management variables.

CRM's Impact on Business Innovation Policies: 2015 to 2019

To grasp CRM's impact on business innovation policies and assert that CRM is a powerful business tool used to manage customer relationships, Guerola-Navarro et al. (2021a) reviewed 17 pertinent studies published from 2015 to 2019. The authors selected business-oriented studies using 'CRM' and 'Innovation' as keywords when searching scholarly journals via the Web of Science database. Guerola-Navarro et al. conducted a qualitative, descriptive study to analyze and classify articles based on CRM dimensions, followed by innovation dimensions by year. For example, Guerola-Navarro et al. classified Cruz-Jesus et al.'s 2019 CRM adoption study as 'process innovation,' which fell under 'customer retention' within the CRM dimension, as firms typically adopt CRM to build customer loyalty and retain customers. Of the 17 selected studies, the authors classified 58.82% under 'customer retention' and 64.71% under 'process innovation' within the 'innovation' dimension. Guerola-Navarro et al.'s study revealed that most of the joint CRM and innovation papers published during this period (Cruz-Jesus et al., 2019; Elfarmawi, 2019; Zand et al., 2018) focused on helping companies use CRM to retain customers.

CRM's Adverse Effects

While plenty of companies implement CRM to retain customers or acquire new ones, Nguyen et al. (2020) explored the adverse side effects of CRM usage, such as the psychological drivers and behavioral consequences of managing CRM. The authors

referred to CRM's adverse side effects as the dark side when a person or entity uses CRM data to take advantage of customers, employees, or stakeholders. Nguyen et al.'s literature review included an analysis of 159 relative sources. Using the articles' key themes, the authors developed a theoretical framework of perception, behavior, and consequences within the context of CRM implementations. The theoretical construct's psychological variables (also known as interventions) included unfairness, distrust, opportunism, and lack of transparency. In their literature review, Nguyen et al. emphasized the importance of ensuring CRM implementations have a long-term strategic focus that enables customers to have a balanced perception of CRM's utility relative to organizational profitability, commercialization, sustainability, and social responsibility.

Strategies for Managing Change to Implement CRM

Establish a Sense of Urgency

Despite CRM's popularity and seeming necessity, 70 to 80% of CRM projects fail, are abandoned, or are never launched (Chen et al., 2020; Delpechitre et al., 2019; Deshmukh et al., 2020; Ngo & Vu, 2021). CRM implementation failure motivated my study and those of numerous other researchers and practitioners. Researchers and practitioners are cognizant of a myriad of impediments pervasive in unsuccessful CRM projects, such as lack of executive sponsorship and top management support (Batista et al., 2020; Deshmukh et al., 2020), poor managerial structure (Al-Omouh et al., 2021), lack of planning and unclear objectives (Nelson et al., 2020), lack of user involvement (Aydin & Akyollu, 2021; Deshmukh et al., 2020), and poor change management (Batista et al., 2020; Deshmukh et al., 2020). These factors affect how organizations and

individuals regard CRM (Al-Omoush et al., 2021). Additional deterrents or implementation risks include technology overload (Delpechitre et al., 2019), implementation complexity (Tazkarji & Stafford, 2020), poor CRM and IT integration (Meena & Sahu, 2021; Tazkarji & Stafford, 2020), and lack of technical competence (Cruz-Jesus et al., 2019). Even with successful implementations, CRM alone does not guarantee firm survival.

One of the worst mistakes leaders make when attempting an organizational change or transformation is careening forward without building a high sense of urgency among employees and managers (Kotter, 1996; Kotter et al., 2004). For most salespeople, according to Labus and Stone (2010), CRM is software hindering them from performing their jobs. In Labus and Stone's study, leaders following a software-centric approach to establish a high sense of urgency among salespeople failed to deliver long-term results. Labus and Stone and Aydin and Akyollu (2021) found that salespeople's resistance to adopting and using CRM was problematic. In Labus and Stone's study, leadership and an integrated strategy—not software—were crucial to reducing complacency and garnering cooperation among salespeople.

There is a lack of empirical research on the influence of CRM on sales performance (Aydin & Akyollu, 2021; Chen et al., 2021; Elfarmawi, 2019; Wang & Lien, 2019). When leaders and managers defeat salespeople's resistance to using CRM, CRM has proved essential in assisting salespeople in finding leads, meeting prospective customers, and positively impacting sales performance (Aydin & Akyollu, 2021). Salespeople with a sense of urgency who adopt and use CRM effectively can achieve

these results and maintain momentum to ensure change sticks. In the following sections, I explored leaders' roles in building the guiding team, creating the vision and strategy, engaging organizational resources, and implementing CRM.

Build a Guiding Team of Organizational Resources

CRM is a global IT change management project replete with risks that, if mismanaged, increase the probability of failure (Deshmukh et al., 2020). Deshmukh et al. investigated how including project managers and their risk management process impacted CRM, while Suoniemi et al. (2022) examined under what conditions hiring consultants affected CRM implementations. Deshmukh et al. found that project managers play a critical role in managing personnel issues, which, if unaddressed, contribute to project failure. Suoniemi et al. found that CRM consultants' success depended on user involvement. Even with a CRM consultant, user involvement was essential to coping with CRM complexity and requirements uncertainty (Suoniemi et al., 2022). Both Deshmukh et al.'s and Suoniemi et al.'s studies validate Kotter and Cohen's belief that influential leaders who are successful at change first find creative ways to compel relevant people to engage and act. Suoniemi et al. emphasized that leaders should spare no effort to garner end-user commitment, empower personnel across the organization, and integrate CRM into the firm's IT architecture.

It is unambiguous that firm leaders should assign credible and trustworthy CRM consultants, project managers, and IT resources to empower others to act. This effort is crucial to stakeholders realizing the benefits they anticipate from CRM. With essential resources in place, the CRM project manager or consultant should seek agreement on

why CRM is required, the company-wide objectives, and the intended benefits. The CRM project manager or consultant should also ascertain how the firm defines success and recommend a process for evaluating CRM performance. Additionally, top managers' distinctive and dynamic capabilities contribute to identifying, structuring, and mobilizing organizational resources that are flexible, adaptable, cooperative, collaborative, and credible. Badrinarayanan et al. (2019) offered insight into how dynamic managers orchestrate corporate resources to drive CRM implementation and performance. Firm leaders select leaders and managers with superior managerial capabilities (i.e., social capital) to determine which key individuals can help articulate the vision and persuade others to embrace the company's goals.

CRM Vision and Strategy

With modern CRM research shifting from technology and software capabilities to management and strategy (Meena & Sahu, 2021), successful CRM implementations have some common findings. Firm leaders oversee determining CRM strategy and vision (Dalla Pozza et al., 2018; Shukla & Pattnaik, 2019), prioritizing investments in CRM activities (Jager, 2021), and organizing around CRM (Badrinarayanan et al., 2019; Dalla Pozza et al., 2018). After surveying 350 managers and CRM experts to investigate the impact of the implementation time in different CRM dimensions on performance, Dalla Pozza et al. identified strategy implementation as the most vital driver of CRM performance in the United States. Dalla Pozza et al. also found that organizational alignment, for example, was not directly related to growth per se. However, organizational alignment 'activity delays' negatively affect customer acquisition,

development, and loyalty. Accordingly, based on Dalla Pozza et al.'s findings, CRM strategy implementation and timely organizational alignment are critical determinants of a firm's CRM performance.

Strategies for Managing Organizational Resources to Implement CRM

Communicate the Vision and Strategy and Empower the Organization

While leadership communicates the CRM vision and strategy, the vision and design may not be that of the firm leader but result from the leader eliciting brainstorming to create the appropriate vision (Kotter et al., 2004). In a CRM business culture, leaders and managers are instrumental in creating an exciting culture to empower organizational resources to recognize the value of using CRM to acquire, assimilate, and exploit customer knowledge (Chaithanapat et al., 2022). CRM is not just a tool, nor is it just a technology platform. CRM is a philosophy, business strategy, and business practice (Greenberg, 2010). Those charged with communicating the process should believe and express to others that firms that do not implement CRM, regardless of size, location, or industry, are at a competitive disadvantage (Bakator et al., 2021). Regardless of CRM's popularity or its touted benefits, complacent or perhaps pessimistic employees will naturally be reluctant to use it. Firms should approach CRM as a philosophical, cultural, and organizational change critical for improving customer satisfaction and firm performance.

Empower Others to Act

CRM requires a plan and agreement on how the organization will approach, implement, use, and manage CRM and how CRM will integrate into the organization.

Before Batista et al.'s (2020) study, the literature primarily ignored empowering employees with customer insights. Batista et al. researched the relationships between the CRM approach (i.e., staff empowerment) and organizational responsiveness (i.e., firm-level strategic action), suggesting that CRM adoption commences with customer-oriented business strategies and includes the complete company ecosystem. Batista et al. found that the CRM approach improved organizational responsiveness, system effectiveness, and staff empowerment—all vital characteristics of mature unified companies. Batista et al. shed light on the importance of integrating customer knowledge into a company's core operational processes, entrenching CRM within the organization, and having motivated employees use CRM to its fullest extent.

Although firms spend a great deal on CRM strategy implementation and organizational alignment, Azhakaraja (2020) believes it is uncommon to embrace CRM as a strategic, firm-wide project fully. Azhakaraja refers to how numerous firms engage in some form of CRM, yet only a few integrate both front-end and back-end processes and data within CRM. In addition to investing time, money, and invaluable resources to fully deploy CRM, firm leaders should ensure they have designated sufficient and appropriately trained and skilled resources. Resources (i.e., managers, consultants, project managers, and IT) are needed for front-to-back integration to help establish and sustain a CRM culture of shared values and norms and to champion change management (Azhakaraja, 2020). Even if unintentional, misuse, mismanagement, underutilization, overuse, or poor integration of CRM can contribute to implementation failure.

Thakur and Srivastava (2018), in their study on 276 middle managers, found that willingness to change (dependent variable) reduced the impact of employee resistance to change (independent variable). Trust, emotional attachment, and perceived organizational support (mediating variables) mediated the effects of the relationship between readiness to change and resistance to change. Employees inherently fight change, so leaders should prepare to address resistance proactively. Leaders should handle employees with care to support them while employees contemplate the need for change and the organization's ability to adapt successfully. Firm leaders/top managers might appreciate Thakur and Srivastava's research because the authors depicted how leaders' understanding of employees' psyche and needs and valuing their input can help conquer employee resistance to organizational change.

Good CRM Culture

CRM's primary goal is to give decision makers a comprehensive understanding of their customers and create opportunities to put vital customers at the heart of business efforts. One may argue that extensive technology usage indicates a strong CRM culture free of employee opposition, enabling firms to adapt to changing business conditions. Guerola-Navarro et al. (2021b) surveyed decision makers to determine if there was a relationship between CRM practices (technology use and CRM culture) and innovation (process and product innovation) in the wine production and distribution sector in Spain. Elfarmawi's (2019) earlier study on the relationship between CRM usage, product innovation, and customer satisfaction had a similar focus to Guerola-Navarro et al.'s (2021b). Yet, Elfarmawi targeted small and medium-sized enterprises in the United

States. When Guerola-Navarro et al. (2021b) used the term culture of CRM, the authors referred to any idea, plan of action, or practice associated with effective CRM and a positive customer-focused culture. Product innovation is how companies adapt, improve, and compete in a global market.

Guerola-Navarro et al. (2021b) assumed the following conditions must be met for a good culture to exist: the culture must be plagued by information sharing, customer involvement, long-term partnership, and joint problem-solving. Guerola-Navarro et al. and Elfarmawi confirmed several assumptions and findings based on survey responses. For a corporation to function well, employees should use CRM intensively (Chen et al., 2021; Guerola-Navarro et al., 2021a), or a robust CRM culture must be in place. While the findings demonstrate that a strong CRM culture positively impacts firm performance, innovation had little bearing on performance in either study (Elfarmawi, 2019; Guerola-Navarro et al., 2021b). Elfarmawi's findings demonstrate that CRM's primary purpose is to provide better customer service rather than to give companies ideas for new go-to-market goods and services. When employees identify with their organization (i.e., the organization's reputation, communication climate, and leaders' motivating language), they become culturally invested (Mayfield et al., 2021). From management, technological, and cultural perspectives, CRM is essential for business success.

Create Short-Term Wins

Chen et al. (2021) examined how 600 customer service employees who worked for a large fortune 500 telecom service firm used CRM to satisfy customers. Chen et al. used the information systems (IS) success framework to conceptualize the mechanisms

underlying post-implementation CRM success in service encounters. Based on employees' self-assessments, most were using the system to its fullest potential. As usage behaviors that generate no performance impact are of little value, Chen et al. also collected customer service data from customers. Based on the customer data, employees' post-adoptive infusion use (post-implementation usage behavior), which expands beyond external use, led to customer satisfaction. According to Chen et al. (2021), Sundaram et al.'s (2007) research was the only earlier study that provided evidence that sales teams' infusion use of CRM led to better sales outcomes.

While there is a great deal of extant literature on CRM failure, literature neglects to address firms that have implemented CRM yet still struggle to determine how to integrate CRM into organizations fully. Deploying CRM and increasing system users does not automatically equate to improved work performance or delighted customers. While Chen et al. (2021) believed infusion was the secret to success for organizations troubled by low return on investment, Azhakaraja (2020) and Nguyen et al. (2020) found success in the context of CRM to be far more complex. Success is using the system as designed and intended, seeing the benefits of system use, and not overusing it. Businesses that empower employees to use CRM and demonstrate how to do so may experience more success than those that merely convince employees to log on.

Crosthwaite and Sittrop (2021) believed that the change management process directly affected CRM performance. With these multiple perspectives, what is apparent in all cases is that managers and employees are involved and communicating in all successful cases. Managers are essential in painting a picture for employees and helping

them envision a future state if they use CRM (Crosthwaite & Sittrop, 2021). Doing so may also positively impact employee morale and create short-term wins that inspire employees to stay engaged and sustain their level of system usage beyond the initial implementation period.

Implementing and Sustaining Change

CRM has historically failed to meet executives' expectations, insinuating that executives have a vision, strategy, and goals and communicating them before initializing CRM. Executives should solicit input and strive to elicit consensus on firm-wide goals and success factors before implementing and evaluating CRM. At a high level, it may behoove firm leaders to deploy CRM to improve operational capabilities and performance, customer satisfaction, increase efficiencies and profitability, and extend the customer life cycle. As firm leaders identify their objectives and confirm the decision to move forward, they should also be aware of extant research on the antecedents of successful and unsuccessful CRM implementations. Researchers believe there is a shortage of evidence proving that integrating CRM increases a company's success (Elfarmawi, 2019; Meena & Sahu, 2021). However, several researchers have explored how CRM may impact a company (Badrinarayanan et al., 2019; Batista et al., 2020; Chen et al., 2020; Cruz-Jesus et al., 2019; Deshmukh et al., 2020). Others have explored how CRM implementation and adoption enhance business performance (Chen et al., 2020; Delpechitre et al., 2019; Herman et al., 2021; Kim et al., 2019; Oh & Ma, 2018; Rodriguez et al., 2018; Zang et al., 2020).

Don't Let Up

CRM system adoption and increased use behavior render positive organizational performance, such as improved customer service, customer retention and growth, and new customer acquisitions. Even in the case of voluntary or involuntary usage, Beaudry et al. (2020) contend that use does not automatically equate with acceptance, and acceptance does not necessarily convert to productive use. According to Beaudry et al.'s study, IS researchers have primarily focused on user acceptance and conformance while ignoring alternative behavioral dynamics and results (e.g., users who accept but do not conform to system usage terms). Additionally, users that resist CRM may not contribute to failure, as resistance is not necessarily an indication of misuse or non-use, despite the implication (Beaudry et al., 2020). Acceptance and adoption do not automatically result in users complying and using the system as intended.

While Beaudry et al. suggest that practitioners and researchers avoid narrowly contributing a binary value of good or bad to users' purposeful or inadvertent behaviors, organizations must understand what defines success and failure. Organizations should contemplate if attributing such a high de facto value to CRM is appropriate. CRM's appeal and potential success motivate executives to embrace some form of CRM to compete in a global marketplace and uncover and avoid factors contributing to project failure. Organizations invest in CRM because of competitive threats, social pressures, cultural norms, and organizational intent. Investing is not a deterrence to loss. According to Kamarudzaman and Jambari (2021), project failure can occur at any stage but often ensues during implementation. Post-implementation adoption success relies heavily on

employees'/users' perceptions of leadership's approach and change management strategy, as well as users' acceptance behaviors (Kamarudzaman & Jambari, 2021).

Making Change Stick

Research on user resistance and system adoption spans multiple industries, including education, manufacturing, consulting, banking, healthcare, insurance, and hospitality (Alzahrani et al., 2021; Shankar & Nigam, 2021). Research shows a growing interest in employee resistance and technology adoption for diverse user behaviors (from resistance to extensive use) and organizational impact (Beaudry et al., 2020). Several researchers have addressed employee resistance and technology adoption (Alzahrani et al., 2021; Beaudry et al., 2020; Chatterjee et al., 2020; Kamarudzaman & Jambari, 2021; Shankar & Nigam, 2021; Shirish & Batuekueno, 2021; Thakur & Srivastava, 2018). Recently, IS researchers have employed a wide range of lenses to examine system adoption and resistance behaviors:

Davis's (1989) technology acceptance model (TAM; Chatterjee et al., 2020; Shankar & Datta, 2018),

Kim and Kankanhalli's (2009) user resistance model (URM; Choi et al., 2021),

Lewin's (1947) 3-step change model (Kamarudzaman & Jambari, 2021),

Rogers and Cartano's (1962) diffusion of innovation (Goh & Sigala, 2020),

Samuelson and Zeckhauser's (1988) status quo bias theory (Alzahrani et al., 2021; Shankar & Nigam, 2021; Shirish & Batuekueno, 2021), and

Venkatesh et al.'s (2003) unified theory of acceptance and use technology (UTAUT; Ben Arfi et al., 2021).

To analyze CRM adoption and employee behavior, researchers have applied management theories, such as TAM (Chatterjee et al., 2020; Wang & Lien, 2019), grounded theory (Tazkarji & Stafford, 2020), resource-based theory (Badrinarayanan et al., 2019), motivation theories (Nelson et al., 2020), and change management models (Crosthwaite & Sittrop, 2021). I recognized the applicability and potential of Kotter's 8-step change management model (KCMM) to explore successful change approaches amid employee resistance rather than narrowly focusing on technology or motivation. Change management models have not been used broadly in CRM or IS-related scholarly literature. A literature review of CRM studies revealed the following: one study used Kotter's change management model (Crosthwaite & Sittrop, 2021), one used Lewin's change model (Jami Pour & Hosseinzadeh, 2021), and one used Hiatt's Prosci ADKAR change model (Mirzoyan & Tovmasyan, 2022). While Kotter's method is limited in CRM literature, Khatteeb (2021) used Kotter's model with an ERP study, and Shonhe and Grand (2019) used Kotter's model with an electronic records management system (ERMS) study. Relative to broader literature, Kotter's change model has successfully guided change in education (Haas et al., 2020; Kang et al., 2022; Wentworth et al., 2020) and healthcare (Baloh et al., 2018).

Anchoring Change: Using the Kotter Change Management Model

For this study, I used Kotter's 8-step change management model as the conceptual lens to explore strategies firm leaders used to manage change and

organizational resources when implementing CRM. Before choosing KCMM, I scrutinized Lewin's (1947) three-step change model and Kotter's (1996) 8-step change model. I also reviewed Peters et al.'s (1980) 7-S framework, a descriptive change management model. Burnes (2020) argues that Kurt Lewin, a German Jew, psychologist, and social activist, designed the three-step model to resolve racism and anti-Semitism and not to address organizational change. According to some recent studies (Bose, 2020; Burnes, 2020), Lewin's model, which includes unfreezing, moving, and freezing has received criticism, mainly because it is simplistic due to its three linear and prescriptive steps. Burnes found that Lewin's model was not straightforward but a robust method for comprehending human behavior and how behavior can change. Additionally, Pregmark (2022) claims that Lewin's model does not address resistance. According to Bose (2020), Lewin addresses the forces against change (i.e., resistance) in the second stage (moving) of the model. To apply Lewin's physics-based three-step model to organizational change, researchers must interpret and translate his terminology into a language most individuals can comprehend (Burnes, 2020). Lewin's model was not the most appropriate for this study due to its origins, nomenclature, mathematical notations, and ambiguous terminology.

Organizations that successfully implement large-scale change use a top-down, linear approach to change management (Kotter et al., 2004). According to Kotter and Cohen, achieving measurable enhancements in business performance is a prerequisite for any change initiative. Defining change and establishing a vision and strategy are critical steps that leaders should pursue early in the process (Kotter et al., 2004). The vision,

which depicts a future date, should be aligned with the organization's strategy (Errida & Lotfi, 2021; Kotter et al., 2004). Even with a well-defined and articulated vision and strategy, a large-scale change that lacks stakeholder support and employee engagement may fail.

Despite the criticism that traditional change models do not keep pace with the current competitive and more innovative environment, researchers still choose traditional models like Kotter's over more modern models (Rosenbaum et al., 2018). Kotter's model continues to complement organizations' hierarchical nature and address long-term projects' technical, social, and cultural implications (Khatteeb, 2021). Kotter's model is a straightforward set of process-related tasks designed to assist leaders in preparing their organizations for transformative change (Errida & Lotfi, 2021). According to Wentworth et al. (2020), KCMM is one of the most widely used models for analyzing changes in large organizations. Wentworth et al. further note that KCMM appeals due to Kotter's effectiveness in implementing the model to drive change initiatives in real-world business organizations.

Change management refers to a process-related tool that change management professionals, leaders, and managers use to assess organizational readiness (Kamarudzaman & Jambari, 2021). Entrepreneur and Harvard University professor Dr. John P. Kotter established the 8-step change model in his 1996 book, *Leading Change*. Kotter (1996) identified eight steps (described in **Figure 1**) for achieving organizational change management success, which winning firms employ:

Step 1: Create a sense of urgency

Step 2: Build/form the guiding team/coalition

Step 3: Create the vision, strategies, and initiatives

Step 4: Convey the vision and strategy to managers, employees, and stakeholders to obtain buy-in

Step 5: Empower others to action

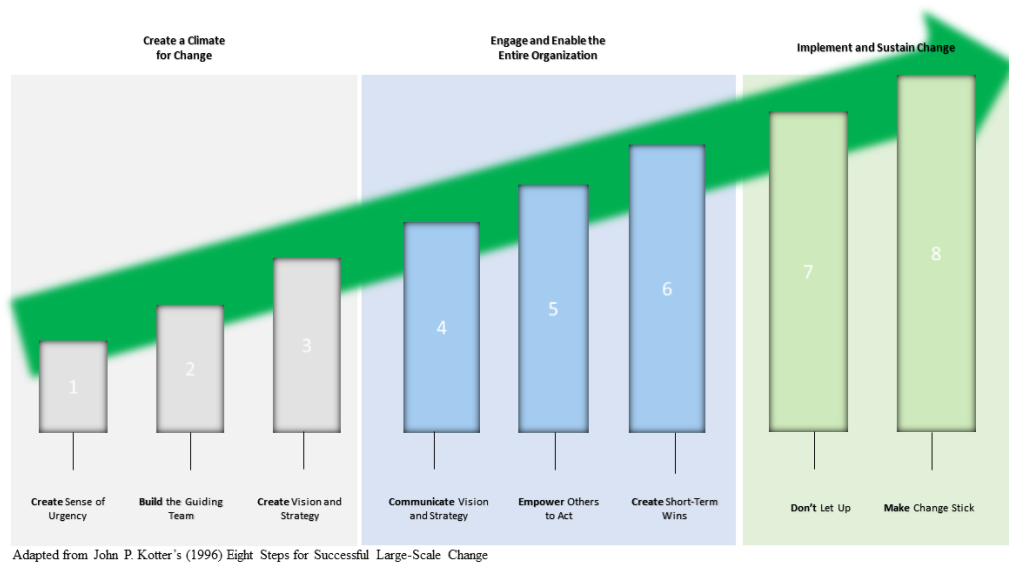
Step 6: Create short-term wins

Step 7: Don't let up; sustain momentum and acceleration

Step 8: Make change stick (i.e., incorporate changes into the culture)

Figure 1

Kotter's (1996) 8-Step Change Management Model



Kotter's model includes a variety of process-related tasks to assist leaders/managers prepare their organizations for transformational change. While Kotter introduced his 8-step change model in *Leading Change* (1996), he analyzed the fundamental issues people encounter when implementing change in *The Heart of Change*

(Kotter et al., 2004). According to Kotter and Cohen, firms that successfully implement large-scale change follow a top-down, linear change management approach. Kotter's teleological change model, depicted in Figure 1, is a clear, straightforward, and linear process for managing change. In the following section, I included an overview of each step in Kotter's change model.

First Step: Establish a Sense of Urgency

In the first step of Kotter's model, leaders take a series of actions or leverage a crisis to help others see and feel the problem (Kotter et al., 2004). Successful CRM change initiatives begin with transformational leaders listening to more than just a few employees', partners', or suppliers' concerns (Kotter et al., 2004). When handled effectively, people (i.e., managers, employees, and others) believe what they see and feel, realize change is required, and are ready for the change process (Kotter et al., 2004). A leader who communicates openly and honestly gives facts supporting the necessity and urgency for change.

In Kotter and Cohen's *Videotape of the Angry Customer*, Wallace learned that the customer was angry at dinner with one of his company's largest customers. The customer was mad because Wallace's company sent him defective built-to-order products that cost him to correct. Wallace asked the customer's permission to videotape him. Within a day, around 50 people in a conference room at Wallace's company viewed a video of this customer speaking candidly. After more than 500 employees eventually watched the video, most were surprised, and a small minority were skeptical. Yet, the videotape was indispensable in helping Wallace chip away at barriers to improvement and motivating

the organization to take action. Before seeing and hearing the angry customer on video, employees were completing tasks but not listening to customers.

Using KCMM, Crosthwaite and Sittrop (2021) interviewed 17 participants from three levels (functional, management, and extended management board) across six departments to determine how an organization may better its change management in the context of CRM adoption. The researchers determined from the semistructured participant interviews that for step one of the change process, participants wanted their leaders/managers to improve how they conveyed a sense of urgency in communicating useable and meaningful data, the why, and knowledge management (Crosthwaite & Sittrop, 2021). Participants did not see, feel, or understand why the company needed CRM or why they should appreciate it. For this reason, Crosthwaite and Sittrop concluded that all guiding team members should participate in establishing and communicating a sense of urgency and vision. Due to the sequential nature of the change model, once the change leader forms the guiding coalition in step 2, the leader and all guiding team members should collaborate to refine the event or issues that prompted the sense of urgency.

Second Step: Form a Guiding Coalition

Presuming firm leaders address step 1 effectively, success in step 2 is contingent on having a guiding team of the right mix of strategic people with capacity, credibility, skills, knowledge, connections, and stature (Kang et al., 2022; Kotter et al., 2004). The project leader's credibility, transparency, and disposition are essential for creating an opportunity for the guiding team to develop and shape effective strategies (Kang et al.,

2022). The guiding team should include trusted and skilled change agents with an emotional commitment to do the job (Kotter et al., 2004). Guiding team members should be in a position of power and capable of translating the vision and strategy into a picture of a future state that appeals to employees. The guiding team should also be capable of breaking through the status quo to inspire members to move from a known to an unknown state without much resistance (Thakur & Srivastava, 2018). According to Kotter and Cohen, no one wants to confront those who are not doing their job, yet the right guiding team is evolving and requires exchanging old members for new ones who understand their roles.

In Kotter and Cohen's *New and More Diverse Team*, once there were no more companies to acquire, a company shifted its business model to focus on organic growth. The small, homogeneous group had to transition from something they were familiar with to something foreign—internal growth. The COO thus invited people from different functional areas at different levels of the company who were diverse in abilities, viewpoints, and backgrounds to join a team charged with providing a new perspective on building the future. The COO handpicked individuals with the credibility, capabilities, connections, and energy to carry out the tasks and grant them the required authority to operate effectively. The team achieved a more balanced and innovative solution due to its heterogeneity.

In Crosthwaite and Sittrop's (2021) CRM study, the researchers surveyed participants to identify three major success factors that applied to step 2 of Kotter's change process: (a) change required in organizational roles, (b) teamwork, and (c)

heterogeneous use of CRM. Survey participants were unsure who was driving the change, if roles and responsibilities were changed to accommodate CRM, and whether team members were proactively communicating. As a result of the firm not having appropriate personnel on the guiding team who understood their roles and believed in CRM, end-users generated inaccurate and ineffective data. To minimize these risks, companies implementing CRM should adhere to Kotter's change model.

Third Step: Develop a Strategic Vision and Initiatives

Presuming firm leaders and the guiding coalition address steps 1 and 2, step 3's success is contingent on the team's ability to paint pictures of the probable future state (Kotter et al., 2004). The guiding team employs visuals to help others transition from frustration to optimism as they begin to visualize viable possibilities. In each step of KCMM, leaders can foster intellectual stimulation and inspiration, but this is their primary focus in step 3 (Page & Schoder, 2019). In step 3, the guiding team undergoes strategic planning to formulate the vision, mission, and strategic goals. The team identifies the primary drivers of change, then crafts a vision and an operational, strategic plan. From the strategic plan, the guiding team creates a sequential change management plan encompassing the vision, goals, budget, resources, deliverables, tasks, deadlines, and metrics (Veselinović et al., 2021). The plan should incorporate measures to identify and mitigate employee resistance (Aydin & Akyollu, 2021; Chen et al., 2021; Thakur & Srivastava, 2018; Veselinović et al., 2021). The strategic plan is useless if the entire organization does not contribute and strive toward the same vision (Page & Schoder,

2019). The program is also meaningless if employees do not value CRM, do not use it, or misuse it.

In *Body in the Living Room* story (Kotter et al., 2004), Marshall's realtor advised him to complete the repairs within 6 months of purchasing a 62-year-old house. Marshall vowed to make repairs within 5 years. The realtor responded by saying, "[A]fter six months..., [y]ou get used to stepping over the dead body in the living room" (Kotter et al., 2004, p. 79). Marshall's story illustrates the significance of defining the scope, timetable, and pace of change Initiatives as part of the strategy. Lack of momentum may contribute to project failure.

Developing a strategic vision and plans requires a strategic situation, strategic posture or behavior, strategic thinking, and information gathering (Veselinović et al., 2021). One of the causes of organizational failure is that organizations underestimate the strength of the vision (Kotter, 1996; Kotter et al., 2004). Kotter describes a compelling vision as imaginable, desirable, feasible, focused, flexible, and simple to communicate. A clear vision can help align people. On the other hand, an ineffective vision is worse than no vision, so organizations should take the process seriously. Leadership creates the vision and strategies, and management creates the plans and budgets (Kotter, 2012). All organizational members should have the same vision.

The manager should determine what the organization should do to succeed and ensure the organization is structured and staffed to carry out tasks. Managers should be poised and skilled at developing and following through on strategic plans. Strategic

planning is an iterative process that integrates diverse perspectives resulting in a straightforward approach to achieving discernable outcomes.

Fourth Step: Convey the Vision for Buy-In

Presuming firm leaders and guiding coalition members address steps 1 through 3, success in step 4 is contingent on the leaders and guiding coalition's ability to communicate the shared vision. It is also vital that the guiding team be skilled in persuading as many people as possible to understand the concept, buy into it, and take action to bring about the desired changes. In step 4, the essence of *The Heart of Change*, leaders and the coalition seek to understand what people are feeling, foresee what insecurities may emerge, and plan to resolve issues before initiating the change process (Kotter et al., 2004). Kotter and Cohen suggest that the guiding team's message be simple to reinforce, creative, genuine, and appealing to individuals who resist change. Aujla and Mclarney (2020) recommend that leaders educate, involve, and support individuals and negotiate disputes before initiating change. Leaders must win over employees and managers by appealing to their emotions and tugging at their heartstrings (Tanner, 2021). The goal is to spend quality time explaining to as many individuals as possible why change is necessary and how it may benefit them.

Haas et al. (2020) and Wentworth et al. (2020) applied KCMM to address curriculum and system challenges in education. In Haas et al.'s study, practitioners used KCMM to improve a lecture-based didactics curriculum in medical residency programs that lacked student engagement. In Wentworth et al.'s study, a university used KCMM to implement a new student evaluation system. In both cases, guiding coalition members

communicated impending changes to as many individuals as possible as quickly as possible. In Haas et al.'s study, the coalition shared its vision with other medical residents, speakers, and stakeholders via email, in-person meetings, conferences, word-of-mouth campaigns, and one-on-one talks. In Wentworth et al.'s study, the university task force used training events, webinars, webpages, and one-on-one meetings to thoroughly describe the system, answer questions, and alleviate concerns. The goal in step 4, according to Aujla and Mclarney (2020), is to educate the whole organization, involve them, listen to them, and resolve concerns before moving further.

Fifth Step: Empower Others to Enact Action

Presuming firm leaders and guiding coalition members address steps 1 through 4, success in step 5 is contingent on the change leader's and guiding team's skill in eliminating obstacles that impede change and empowering broad action through participation (Kotter et al., 2004). With large-scale change initiatives, some organizations fail because leaders do not deal effectively with obstacles that block others from embracing and acting on the vision (Kotter, 1996; Kotter et al., 2004). Employee resistance and other organizational barriers can undermine leaders' credibility and jeopardize large-scale change attempts (Page & Schoder, 2019). Change leaders should be aware of potential obstacles, such as disempowering bosses or middle managers, the mind (i.e., individuals' belief in their abilities), evaluation and rewards problems, and lack of information (Kotter et al., 2004). In the following scenario, a middle manager was adamant about maintaining the status quo and functioning as usual until his employer's drastic decision resulted in him seeing and feeling what the customer was experiencing.

In *Retooling the Boss* (Kotter et al., 2004), Wallace sent a 20-year employee (Joe), who resisted change and customer feedback, to work for 6 months for a dissatisfied customer. From this new vantage point, Joe learned first-hand that the high-quality products he had delivered to the customer created problems. Joe was not only committed to remedying the quality issues his group had made, but as the customer's newest advocate, he returned to his employer ready to quickly correct the problems and ceased to be a barrier to change. Wallace had the authority, vision, and connections as a top manager to act on an unconventional, creative solution to help Joe experience the customer's problem for himself and become a change agent. In addition to eliminating obstacles and dealing with resistance, empowerment is about giving people new authority, new responsibilities, motivation, and support (Kotter et al., 2004). According to Pregmark (2022), empowerment should focus less on dissatisfaction (such as obstacles and resistance) and more on creating desire, encouragement, and a trusting culture.

After surveying 276 middle managers, Thakur and Srivastava (2018) found that trust, perceived organizational support, and emotional attachment mediates the relationship between resistance and readiness and that readiness to change reduces the negative impact of resistance. When moving from the unknown to the known, managers who understand their employees' psyches can offer them a human touch and positively influence change management outcomes (Thakur & Srivastava, 2018). Thakur and Srivastava highlighted several ways managers could learn more about their employees and foster mutual trust and respect. Managers should keep their eyes and ears open,

provide organizational support using motivating language, empathize, and share authority and control, which is encouraging and empowering.

Top management support is crucial for empowering others, particularly in the case of system adoption (Al-Omoush et al., 2021; Badrinarayanan et al., 2019; Chen et al., 2018; Deshmukh et al., 2020; Mações & Román-Portas, 2022; Mayfield et al., 2021; Meena & Shau, 2021; Pregmark, 2022; Thakur & Srivastava, 2018). While Kotter et al. (2004) stress top managers' role in painting a picture of a future state, Pregmark (2022) believes managers should be skilled in letting the future emerge when the future is unclear. Despite the volatile and uncertain contemporary competitive landscape, managers must choose how to employ traditional change models to strategically manage organizational changes, even when the vision and strategy are ambiguous (Pregmark, 2022).

According to Mações and Román-Portas (2022), top managers should adopt an empowering leadership style to engage employees in the change process and lessen opposition. Mações and Román-Portas further concluded that transformational and transactional leaders had a direct positive relationship with organizational change in the hospitality sector in Portugal. Additionally, employees that feel connected to the organization are more willing to exert effort to achieve objectives (Mações & Román-Portas, 2022). Similarly, Mayfield et al. (2021) advocate for leaders to use motivating language to increase followers' organizational identification. According to Mayfield et al., leader-motivating language includes when leaders use direction-giving language,

empathetic language, and meaning-making (e.g., stories about people who used to work for the company).

When managers are ineffective in motivating and empowering others through language or other means, Badrinarayanan et al. (2019) suggest that organizations analyze managers' managerial qualities rather than focusing on members' motivation.

Badrinarayanan et al. found that managers' managerial capabilities (i.e., social capital, human capital, and cognition) coupled with their access to skilled resources enable managers to detect opportunities and threats and mobilize resources. In their study, Al-Omouh et al. (2021) found that organizational context, technological context, normative pressures, and coercive pressures significantly impact social CRM (SCRM) entrepreneurship. Examples of SCRM entrepreneurial activities include incorporating social media into CRM to improve customer satisfaction, retention, and acquisition. Converging SCRM and entrepreneurial activities to boost a firm's customer focus is challenging.

Sixth Step: Generate Short-Term Wins

Presuming firm leaders and the guiding coalition address steps 1 through 5, success in step 6 depends on leaders and the guiding coalition's ability to demonstrate desired results quickly. There is no debate about whether people are more receptive to meaningful accomplishments or empty platitudes (Kotter et al., 2004). Another cause of failure is when organizations fail to create short-term wins that matter to decision makers, supporters, and cynics (Kotter, 1996). Quick and momentous short-term wins are critical success factors for change management projects. In the scenario that follows, a company

struggling to stay afloat managed to finish a handful of crucial tasks quickly rather than stumbling over hundreds.

In *The List on the Bulletin Boards* (Kotter et al., 2004), Ross Kao wanted to avoid simultaneously putting too many balls in the air. Kao wanted the team to focus so they could experience some quick and easy yet significant wins and feel good about their accomplishments. He collaborated with a small group to identify the top four issues instead of compiling a comprehensive list of all the problems the company was facing and allocating resources to each. He called the list ‘the Big Four’ and published it where employees could see it often, talk about it, work on their tasks, and celebrate some overnight accomplishments. Prioritizing projects or tasks that skilled and motivated people can quickly complete could lead to short-term wins (Kotter et al., 2004). Establishing small, attainable goals along the way may positively influence those who still do not believe in the project or process.

Khatteeb (2021) examined qualitative data on Lewin’s, McKinsey’s, ADKAR’s, Bridges’, and Kotter’s change models to compare applications of various change models from secondary sources. Khatteeb determined that adaptive firms implementing ERP would benefit from using Kotter’s model, which involves planned change. As cross-functional technological transformations such as ERP are inevitable, Khatteeb believes Kotter’s model has the best potential to reduce resistance, boost success rates, and produce tangible improvements. Without change management, many system implementations (i.e., ERP and CRM) will fail.

To identify change management success factors, Errida and Lotfi (2021) examined 37 organizational change models starting with Lewin's as the foundation of all subsequent models. According to Errida and Lotfi's study, the best change model depends on the circumstances surrounding the change and, in some cases, warrants combining several models to find the best fit. Both Mento et al.'s (2002) 12-phase approach and Kanter's change management wheel are processual models (Errida & Lotfi, 2021), like Kotter's, that include quick wins for motivation. Regardless of the model chosen, organizations that are excellent at change management plan for quick wins early in the project and celebrate milestones.

Seventh Step: Sustain Acceleration

After some short-term wins in step 6, success in step 7 depends on leaders and the guiding coalition's skill in remaining focused, avoiding complacency and complex politics, and sustaining momentum (Kotter et al., 2004). Once the organization has experienced some quick, short-term wins, there is a risk that people might grow weary and tired of change. Employees' inability to stick with change is especially the case with disempowering managers or cynical employees that initially believed the goals were ambiguous (Nelson et al., 2020) and individuals who were never fully convinced that change was necessary (Aydin & Akyollu, 2021). When employees identify with their organization (Mayfield et al., 2021) and have a solid organizational commitment (Aujla & Mclarney, 2020), they become culturally invested and motivated in the organization's success. When leaders fail to provide managers with the tools and training to help

motivate employees, employees might become de-motivated, dissatisfied, and disengaged (L. Koziol & M. Koziol, 2020).

After a short-term win, even motivated employees may forget why a change was necessary in the first place. Periodic and consistent reporting and incentives are essential for sustaining change. If employees perceive activities as non-value-added, money alone will not convince them to continue taking on additional responsibilities and risks. When urgency drops, it may be necessary to go back to step 1 and revisit the problem. In the following scenario, Nolan and Featherstone (Kotter et al., 2004) formed a diverse task force of eight visible and credible employees. Nolan and Featherstone empowered their task force to highlight issues in a way that resonated and stuck with executives.

In *The Merchant of Fear* (Kotter et al., 2004), Nolan and Featherstone knowingly disregarded the company's long history of poor investment planning due to work silos and complicated politics. Nolan and Featherstone created a powerful, cross-organizational, dedicated task force called an 'Action Lab' to address the company's poor investment planning. With the Chief Executive Officer's (CEO) support and limited boundaries or governing rules, the task force's goal was to be transparent, candid, bold, and creative in addressing silos, work politics, and behaviors that negatively impact investment planning. The CEO equipped the task force with sufficient leeway, time, access, and creative freedom to surmount obstacles and diffuse some defensiveness. The task force was responsible for identifying and highlighting the correct issues in a way that resonated with the executives.

The task force spent 6 weeks collecting data, creating absurd videos imitating people being unreasonable, and showing video snippets to executives. One video was *The Merchant of Fear*, a skit depicting an outlandish and exaggerated person manufacturing reason to increase the budget. The merchant of fear would always have an explanation for why they required additional funding, as the merchant of fear never believed enough funds were budgeted. The videotaped images resonated with the group of 20-30 executives that the task force mocked in the skits. The task force's goal was to use short, videotaped performances and role-playing to help reduce employees', especially executives', unhealthy behaviors in the future.

In a multi-year system implementation project at a mid-sized university in the United States, Wentworth et al. (2020) used Kotter's change model as a template to implement a new, robust system for evaluating faculty members' curriculum and teaching skills. All three authors, Wentworth et al., served as participant-observers in the university-wide implementation project to replace the 20-year-old legacy system that no longer met the institution's needs. After the diverse task force selected a vendor's offering and became experts on the new system, each member assumed responsibility for assisting others in comprehending the vision and assuaging their fears (Wentworth et al., 2020). The task force conducted four semester-long pilots of the new system over 2 years and disseminated reports to all users detailing their findings (Wentworth et al., 2020). After pilot testing, 81% of the faculty voted to move forward with implementation along with all three deans.

In a different higher education study, Kang et al. (2022) also used Kotter's model as a template yet to address inequitable retention and inadequate career preparation of diverse students at a university in the southwestern United States. Like Wentworth et al.'s study, Kang et al.'s study was also a multi-year effort with an interdisciplinary team of engineering faculty and administrators. While both Wentworth et al. and Kang et al. used Kotter's model, Kang et al. only linearly applied the model during the planning phase and adapted the model during the implementation phase. Following an iterative procedure allowed Kang et al. to modify the model to account for any changes during and following the pilot to avoid complacency and sustain momentum. In this study, Kang et al. were among the first to apply a non-linear version of Kotter's model, managing the steps as agile and revisable rather than deterministic.

Eighth Step: Incorporate Changes Into the Culture

Success in step 8 depends on leaders and the guiding coalition's ability to keep a robust organizational culture with behavioral continuity and remind everyone why the change was and is still needed (Kotter et al., 2004). Culture and habits do not fundamentally change until change agents fully implement the change and changes have roots (Kotter et al., 2004). Change is the organization and the people, their behaviors, and their involvement in the change process. According to Aujla and Mclarney (2020), managers should involve users early to build strong relationships and ensure employees feel a sense of belonging. Page and Schoder (2019) also believe managers are vital to sustaining change by engaging employees across the organization and communicating openly and honestly. Organizations may see long-lasting, sustainable results when leaders

or managers can empower and inspire employees to participate in change actively and institute change policies and procedures.

Once the organization completes the change and there is behavioral continuity, Kotter and Cohen believe change should be sustainable. Cultural transformation should follow successful change implementation (Kotter et al., 2004). Even after CRM implementation, as the organizational culture improves, so does CRM performance (Abdavi et al., 2018). As organizations address resistance and solve problems throughout the change process, they form shared assumptions, values, and norms that affect their organizational commitment (Abdavi et al., 2018; Azhakaraja, 2020). Some of those assumptions include the following: lack of trust impedes organizations from achieving the full potential of CRM (Chen et al., 2021; Jager, 2021; Thakur & Srivastava, 2018), and employees should use CRM intensively (Chen et al., 2021; Guerola-Navarro et al., 2021a). If employees claim to value CRM but do not use or misuse it, the organization reverts to step 1 of the change management process.

Conclusion of the Literature Review

Employee resistance and adoption are opposed yet co-exist in technology change management initiatives. Ubiquitous change management theories and models focus on people, groups, and organizations. This paper focused on organizational change as firm leaders attempt to steer the entire company to align with their corporate strategies. While there is little application of Kotter's change model in CRM studies, it is the appropriate lens to investigate firm leaders' CRM strategies. In successful CRM implementations, leaders communicate the CRM vision and strategy, create a CRM business culture,

empower employees, and ensure employees recognize CRM's value as a philosophy and business strategy. With this approach, leaders and managers organically mitigate end-user resistance.

Transition

Despite firms' investment in system-related business tools and firm-wide change initiatives (i.e., CRM, ERP, supply chain management, product data management, and business intelligence and analytics), there is a high failure rate. In a CRM business culture, leaders and managers are instrumental in empowering employees to recognize CRM's value (Chaithanapat et al., 2022). One of the worst mistakes leaders make when approaching a critical change project is careening forward without building a high sense of urgency among employees and managers (Kotter, 1996; Kotter et al., 2004). Employees inherently fight change, so leaders should handle employees with care to support them while employees contemplate the need for change and the organization's ability to adapt successfully. Suoniemi et al. (2022) emphasized that leaders should spare no effort to garner stakeholder commitment and empower organizational personnel before implementing CRM.

In Section 1, I discussed the purpose of the study, its nature, the research question, the interview questions, and the conceptual framework. Section 1 also consisted of a literature search strategy, statistics, and synthesis of extant literature supporting the research question. In Section 2, I restated the research objective, provided a comprehensive overview of the research method and design, and summarized the population and sampling. I also discussed the researcher's and participants' roles. I then

researched data collection, tools, methodologies, and analysis. I give the results of my qualitative multiple case study design in Section 3. The results contain significant themes, fascinating insights, and an explanation of how my study might be used in business practice to affect social change, all through the lens of change management.

Section 2: The Project

The researcher's role follows the purpose statement from Section 1 in Section 2. In qualitative research and case studies, researcher bias is a significant obstacle; therefore, researchers must thoroughly understand their role and potential obstacles. Some obstacles may be ethical, such as a researcher needing to determine how to safeguard a company's confidential and proprietary data. Section 2 includes an overview of the researcher's role and research ethics. In addition, Section 2 provides an overview of research participants, their qualifications, the selection of participants who were relevant to the research question, and gaining access to participants. The research method and design are revisited from Section 1. Section 2 concludes with a description of the qualitative data analysis process and my role in ensuring the reliability and validity of the study.

Purpose Statement

The purpose of this qualitative multiple case study was to explore strategies that firm leaders use to manage change and organizational resources when implementing CRM. The targeted population consisted of a minimum of five B2B firm leaders working for SMEs within Texas who have used strategies to manage change and organizational resources when implementing CRM. The data consisted of participants' responses to semistructured interview questions and pertinent organizational documentation. The findings from this study may positively affect social change in SMEs because improved CRM system use may lead to new business prospects and affect sales orders and, thus, firm revenue. As a result, firms might have extra money to increase involvement in local

CSR programs like offering employees a quarterly paid week of service, funding paid internships for local high school and college students and collaborating with local community organizations to provide low-income residents or single parents with free online career training.

Role of the Researcher

The researcher's role in qualitative data collection was to identify reliable and valid data sources through interviews, observations, or relevant and credible peer-reviewed sources. In qualitative studies, researchers are the data collection instrument responsible for reducing researcher and participant bias (Saunders et al., 2016). As the researcher, I minimized bias by not volunteering my perspective and not influencing participants' responses or rushing them. Researchers should demonstrate knowledge of the research topic, competence, credibility, and professionalism by being prepared and encouraging participants to share authentic information (Saunders et al., 2016). During an interview, the researcher must listen carefully, take detailed notes, summarize, and restate what participants shared, and observe nonverbal cues that may warrant unscripted clarification (Saunders et al., 2016). Using an interview protocol helps mitigate bias and the researcher's natural inclination to view and interpret data via a personal lens (Saunders et al., 2016). Interviews are also the ideal method for doing in-depth case studies of individuals' past occurrences (Merriam & Tisdell, 2016).

In this study, I served as the data collection instrument and interviewer who used open-ended interviewing to gain an in-depth understanding of firm leaders' activities and decisions relative to a contemporary business problem (Saunders et al., 2016). As a

corporate executive, I work closely with firm leaders, sales and marketing executives, and salespeople, and I use CRM. It was essential that I did not overlook my biases and that I examine and bracket my various levels of consciousness and set my preconceptions in abeyance. Janak (2022) recommended that researchers focus their self-analysis and self-interview on the following areas: their background, perception of the subject, interpretations, impact, ethical and political issues, and the unexpected. Monitoring how firm leaders manage change and organizational resources when implementing CRM has exposed me to the complexities of large-scale change initiatives. I solicited study participants on LinkedIn by searching for sales and marketing executives working for SMEs in Texas who had successfully used CRM for 3 or more years. I corresponded with participants through LinkedIn, email, telephone, and web conferencing.

As the researcher, I complied with *The Belmont Report* protocol (see White, 2020) for ethical research. The Belmont Report includes three basic ethical principles that underlie research involving human subjects: respect for persons, beneficence, and justice (as cited in Pritchard, 2021). I complied with these regulations and policies by obtaining informed consent before the interview, ensuring that participants understood the topic and research objectives, and confirming their willingness to participate. I also mitigated potential harm to participants by assessing the shared information's risks and benefits and subsequent usage. To further improve reliability, I invited participants to review interview transcripts and enlisted support to interpret the findings.

Participants

The research participants included five B2B firm leaders of SMEs in Texas. The eligibility criteria to participate in this study included leaders who successfully managed change and organizational resources when implementing CRM. The firms must have implemented CRM, have used it for at least 3 years, and have proof of postimplementation success. Once the Institutional Review Board (IRB) authorized me to move forward, I used LinkedIn and the ZoomInfo B2B database, which contained company profiles for over 95 million companies, to find potential candidate participants. As the researcher, I considered each individual's role, experience, knowledge, and CRM observations. I surveyed sales and marketing leaders to identify the firms that have successfully implemented CRM systems. I invited a subset of professionals (approximately five) from different firms to participate in my study. In the case of roadblocks, I identified potential gatekeepers who were influential in helping me gain access to the targeted survey participant (see Saunders et al., 2016).

To obtain valuable and insightful feedback, I treated research subjects equally, albeit with deference. To establish a positive working relationship with participants, I communicated in an open, considerate, clear, and thoughtful manner. I adhered to their guidelines regarding communication cadence, timing, and methods, whether spoken or unspoken. I also ensured respect for all participants, their interests, and their careers. I ensured that participants understood the research question and objective and their role and consent to participate (see Pritchard, 2021). I refrained from passing judgment on their practices or providing advice or feedback.

Research Method and Design

Using a qualitative multiple case study, I investigated firm leaders' strategies for managing change and organizational resources when implementing CRM. According to Meena and Sahu (2021), most CRM research from 2000 to 2020 was empirical or conceptual and focused on CRM strategy and management. Investigating my research question required an interpretive or qualitative research design. Due to the complexity of CRM implementations and the role of change management and organizational resources, a case study approach facilitated an in-depth, multidimensional examination of how successful SMEs in Texas implement CRM.

Research Method

Qualitative research was appropriate for understanding firm leaders' experiences, their interpretation of those experiences, and the significance they ascribe to those experiences (see Merriam & Tisdell, 2016). My personality, background, interests, and skills complement qualitative research, in which words rather than numbers serve as data. In qualitative research, findings derived from participants' words become vital themes, typologies, and concepts that describe what the researcher has uncovered about a phenomenon (Merriam & Tisdell, 2016). Existing theories do not account for the CRM phenomenon. My research did not involve surveying participants, quantifying anything, testing hypotheses, or generating predictions. The quantitative research method was not appropriate for this research because it did not lend itself to an in-depth exploratory study of the research question (see Lanka et al., 2021). Neither the quantitative nor mixed-

method research (which includes quantitative research) methods were appropriate for this study.

Research Design

I explored ethnography, phenomenology design, and qualitative case studies for the research design. Ethnography concerns the study of people, human society, culture, and the interaction of the two (Merriam & Tisdell, 2016). I was not planning to spend time with a group to study their cultural experience, so ethnography was inappropriate. Phenomenology concerns the shared nature of a lived experience among a particular group concerning a specific concept (Englander, 2019). As I did not intend to share the lived experiences of a group, a phenomenological design was inappropriate.

A case study is a detailed description and examination of a specific entity or single unit, at the exclusion of all others, that serves as an example of a contemporary phenomenon (Merriam & Tisdell, 2016). For this study, the unit of analysis was firm executives working for SMEs in Texas who managed change and organizational resources when implementing CRM. I targeted high-ranking executives of SMEs in Texas with experience with one particular technology. There was a limit to the number of people I could interview, which bounded the phenomenon and qualified this study as a case study. I used an exploratory multiple-case study design to replicate and compare findings across diverse organizations or analytical units. I interviewed a minimum of five, which was the minimum number of people I planned to interview until I reached data saturation. According to Merriam and Tisdell (2016), data saturation occurs when researchers hear similar responses, observe similar behaviors, and gain no new insights.

Population and Sampling

The total number of cases from which a sample is drawn is known as the population (Saunders et al., 2016). The targeted population consisted of B2B firm leaders working for SMEs within Texas who used CRM for at least 3 years. Specifically, the firm leaders were qualified to serve as key informants and were able to share their experiences as organizational leaders. Firm leaders might be sales or marketing executives and called a chief sales officer, chief marketing officer, chief technology officer, senior vice president, vice president of sales or marketing, or something equivalent relative to authority and responsibilities. As planned, I conducted online synchronous video interviews where the participant and I could see and hear one another. With online interviews, researchers can record interviews regardless of the location of potential participants (Merriam & Tisdell, 2016).

Due to restrictions such as time, money, and access, not every firm leader in the population should participate in the study (Saunders et al., 2016). Because collecting data from the entire population is impractical, researchers select a sample or subset of participants from the targeted population. I used purposive sampling to determine the correct sample size and whom to choose based on how well participants met the inclusion criteria, which includes the ability to answer the research question (see Moser & Korstjens, 2018). Due to the study's narrow and specific focus, five unique participants were sufficient to obtain meaningful themes, meet data saturation, and make valuable interpretations. I reached data saturation with five participants. The objective was to select knowledgeable, responsive, and amenable participants to share their experiences

(see Sebele-Mpofu, 2020). Low (2019) suggested that researchers determine sampling adequacy by saturation and replication. Once I heard similar ideas and themes and no new information or themes, data saturation occurred.

Ethical Research

Before accessing participants or participant data, I sought and received the IRB's approval from Walden University (Approval No. 12-21-22-1030171). Using the Informed Consent form, I obtained participants' consent to participate in the study and share their information. I demonstrated respect for them as individuals and professionals (VandeVusse et al., 2022). I informed participants that they would not receive incentives or gifts for their participation. I provided participants with timely information to ask questions to determine if they were willing to participate in the study. I allowed them to review, absorb, and process information and avoided pushing them to make swift decisions. I also avoided making them feel obligated to participate or respond in a manner that did not reflect their actual observations, experience, or feelings.

I have kept participants' confidential and proprietary information and personal thoughts and experience safe and protected their identity. I avoided disclosing any information that might risk their firms' intellectual properties or ability to compete in their respective markets. Such information might include individuals' names or any other identifying information. No participants informed me that they no longer wanted to participate in the study.

Data Collection Instruments

As the researcher, I served as the primary data collection instrument. In qualitative studies, researchers are the data collection instrument because they interview participants, interpret their responses (Saunders et al., 2016), and determine if the information is adequate (Sebele-Mpofu, 2020). I conducted five semistructured interviews (see the Appendix for the interview protocol and Appendix B for the interview questions) to ensure data saturation for my research design. Data saturation occurs when researchers hear similar responses, observe similar behaviors, and gain no new insights (Merriam & Tisdell, 2016). Interview protocols (see Appendix A) address the business problem, research question, and purpose.

I used clarifying follow-up questions to improve the reliability and validity of the interview data. I invited interviewees to participate in member checking of interview transcripts to verify that I correctly interpreted their responses and that they were comfortable with what they disclosed. In qualitative studies, researchers also review secondary data. Secondary data may include contributions from others within an organization (Saunders et al., 2016), company documentation (i.e., communications, webinars, project documents, and reports), and archival records (i.e., survey data and budget information) to aid in capturing participants' experience (Alam, 2021).

Data Collection Technique

Having few individuals involved makes data collection more manageable and saves time (Saunders et al., 2016). Additionally, collecting data from fewer cases allows the researcher to collect, check, and analyze more detailed information and maximize

existing data (Saunders et al., 2016). According to Lanka et al. (2021), the sample size does not affect the complexity and quantity of data. I obtained each human subject's written consent to use a videoconferencing tool to record the interview to maintain a chain of evidence (Yin, 2018). Using the consent form, I asked participants to assist me in reviewing and capturing insights I may have missed during their initial interview. To collect primary data, I conducted and recorded five online one-on-one semistructured interviews.

I recorded interviewees' intonations, long pauses, and stuttering, as well as my real-time reflections and thoughts. For the transcribed interview, I invited participants to engage in member checking for data interpretation and interview transcript review, which, according to VandeVusse et al. (2022), is one of the most common forms of shared qualitative data. Some advantages of interviews are the ability to record, observe, and preserve everything said and the software for verbatim transcription and analysis (Merriam & Tisdell, 2016). Even though interviews are the primary data source in qualitative research, the respondent's health and disposition at the time of the interview may affect the data quality (Merriam & Tisdell, 2016). To collect secondary data, I requested that participants share any material relevant to the study, such as CRM-related implementation documentation, processes, reports, performance goals, user feedback, metrics, project plans, schedules, or vendor proposals that could help answer the research question.

Madden and Tarabochia (2021) asserted that secondary data research is beneficial and can produce high-quality outcomes when conducted correctly. One challenge with

using printed or online documents and artifacts as secondary source material in qualitative research is determining the documents' authenticity (Merriam & Tisdell, 2016). Secondary source materials may include an outdated account of a phenomenon from an individual who indirectly experienced or observed the phenomenon (Merriam & Tisdell, 2016). The observer's personal biases and data collection method were a potential source of controversy relative to data validity. The interview protocols are in Appendix A.

Data Analysis

As the researcher, I collected, organized, and analyzed data to comprehend why significant recurring themes, ideas, and alternative viewpoints occur. I used NVivo software to condense, organize, and categorize data for quality analysis (Saunders et al., 2016). I used Microsoft TEAMS to transcribe interview recordings and NVivo to code data to help identify the speakers, what they said, their sentiments, main points, surprising perspectives, and commonalities. With NVivo, as the researcher, I was also able to run a word frequency query to determine which words participants used most frequently. The resultant visual word cloud or graphs revealed emerging themes and insightful patterns.

In contrast to quantitative research, where researchers derive meaning from numbers, qualitative research reveals multiple realities through individual perspectives of a phenomenon based on words and images (Saunders et al., 2016). For my research study, I used Kotter's change management model to formulate my research question. Using Kotter's theoretical model, I employed a deductive approach to data analysis to

link my research to the existing knowledge on change management. To ensure quality data analysis, I performed data analysis during and after data collection through a concurrent and recursive process of correcting and cleaning data. Additionally, I analyzed data following each interview to prevent losing ideas or forgetting interpretations. Saunders et al. refer to this form of analysis as an interim summary, a working document consisting of an overview of key points and observations identified following each interview.

In a multiple case study, the researcher attempts to construct a general explanation that fits each case, despite the differences from one case to another. This method caused me to zero in on specific subsets of the resulting data set as I searched for themes relevant to my research question. Saunders et al. outlined the procedure for conducting thematic analysis: the researcher becomes familiar with the data, codes the data, manipulates the data, searches for key themes of interest, refines themes, interprets the data, and evaluates propositions. The research objective, research question, and case study design led to a literature review and conceptual framework that helped validate my research question and data collection plan.

The study of strategies to motivate employees to use CRM systems suggested that some firm leaders lacked strategies to reduce employees' resistance to using CRM systems. For each firm, the purpose of the case study was for leaders to describe their approach to reducing employees' resistance to using CRM systems. A general analytical strategy, such as linking case study data to key concepts or points of interest, is the best way to prepare for case study analysis (Yin, 2018). Using theoretical propositions as the

analytical strategy, the resulting concepts offer researchers guidance for conducting data analysis (Yin, 2018). In a multiple case study, Yin noted that the researcher attempts to construct a general explanation that fits each case, despite their nuances.

Data Organization Technique

As the researcher, I used NVivo qualitative data analysis software to automatically transcribe and organize diverse data and produce verbatim custom transcripts and reports for analysis. Using NVivo instead of traditional mind mapping software alone lessened the number of manual tasks and afforded me, the researcher, more time to identify patterns, categories, and themes and draw conclusions. As the researcher, I used interview themes that I derived from the literature, theories I considered, my experience, observations, and discussions with research participants for data triangulation. Methodological triangulation uses different data collection techniques and sources to corroborate data acquired at various points in time (Merriam & Tisdell, 2016). Methodological triangulation is essential for case study research (Saunders et al., 2016). Access to a firm's documentation and artifacts further allows for data triangulation (Saunders et al., 2016).

I uploaded data to NVivo, including interview recordings or transcripts, my notes and observations, and firms' documentation (i.e., surveys and memos). The data loaded into NVivo is encrypted and stored for 5 years. I also used Mindjet MindManager brainstorming software, Microsoft OneNote, and Microsoft Excel to keep track of ancillary thoughts, ideas, and findings. NVivo aggregated and synthesized data to obscure sensitive information.

Reliability and Validity

Adopting a qualitative methodology supported by multiple case studies assisted firm leaders in learning how each participating firm leader managed change and organizational resources when implementing CRM, thereby allowing other firm leaders to replicate dependable strategies and procedures to achieve comparable results.

According to Yin, a researcher must meet the following conditions in a case study: (a) construct validation so that the researcher can accurately evaluate the studied concepts; (b) reliability related to the possibility of replicating the study a second time; (c) internal validity, to ensure that the inferences drawn from the data are adequate; and, (d) external validity, which derives from the ability of the results to represent the studied phenomenon. Construct validity is the degree to which a case study's measures accurately reflect the investigated concepts (Yin, 2018). My doctoral committee of experts reviewed my research objective, research question, and interview questions to ensure construct validity.

Reliability

Reliability is essential for case study findings' credibility, dependability, and transferability (Quintão et al., 2020). Researchers have long criticized the case study approach due to its low reliability and validity (Quintão et al., 2020). For qualitative research to be reliable, researchers must demonstrate the study's authenticity and trustworthiness and ensure that their application of methods and interpretations resonate with the reader and can be replicated (Merriam & Tisdell, 2016). With qualitative research, due to the researcher's subjectivity, data collection and interpretation may be

susceptible to bias. The researcher's role as interviewer and presence during semistructured interviews may impact participants' responses. As the researcher, I worked to ensure readers understand the objective and rationale for the study and recognized the study's value.

Researchers use case study approaches to comprehend a phenomenon by synthesizing multiple perspectives. In a case study, the researcher must ensure various sources of evidence, data triangulation, and review of interview transcripts. I considered data from various case studies and multiple participants to ensure transferability concerning the reader and future research and for data triangulation, which according to Quintão et al., is a more robust approach than a single case study. Involving multiple data sources (i.e., research participants) will aid in establishing reliability and ensure the rigor and robustness of the case study approach. The researcher can ensure the study's credibility by conducting member checking, data triangulation, validating interview questions, reviewing interview transcripts, capturing researcher thoughts, and adhering to the pre-established interview protocol (Yin, 2018).

Validity

To ensure external validity, I selected a minimum of five cases. Each firm and research participant provided strategies for managing change and organizing resources when implementing CRM. To improve the quality of the multiple case studies and ensure construct validity, I invited the study participants to review the interview transcripts. Participants' clarifications or corrections addressed confirmability and enhanced the accuracy of the case studies. Confirmability in qualitative research is coming as close to

objective reality as possible (Stahl & King, 2020). To further improve confirmability, I strived to be precise, accurate, and systematic while avoiding data and research environment contamination.

Due to the study's narrow and specific focus, five participants were sufficient to obtain meaningful themes, meet data saturation, and make valuable interpretations. Low (2019) suggests that researchers determine sampling adequacy by saturation and replication. Once I heard similar ideas and themes and no new information or themes, data saturation occurred (Merriam & Tisdell, 2016). One of the goals of qualitative research is to broaden understanding by transferring findings from one environment and situation to another (Stahl & King, 2020). Research is transferable when a detailed description evokes a vivid enough image to allow others to apply the findings to different circumstances (Stahl & King, 2020). As the researcher, I provided thick contextual descriptions when presenting my findings and recommendations regarding future research.

Transition and Summary

In Section 2, I reiterated the purpose of the study, the research method and design, and the population and sampling. Section 2 also includes an overview of the informed consent for data collection and sharing. The remainder of Section 2 provides an overview of the data collection instruments, data collection techniques, and data organization techniques I employed and adhered to moving forward. The second section concludes with a procedural description of the data analysis process for the case study design and how I, as the researcher, ensured the reliability and validity of the qualitative data.

In Section 3, I presented the findings of my qualitative multiple case study design. The findings include important themes, intriguing observations, and a synthesis of the peer-reviewed studies from the literature review and literature published since I wrote my proposal. I also connected my findings to my conceptual framework and demonstrated how my findings support or contradict existing literature. Ultimately, I demonstrated how my research and findings can be applied to business practice and affect social change.

Section 3: Application to Professional Practice and Implications for Change

Introduction

The purpose of this qualitative multiple case study was to explore strategies that firm leaders used to manage change and organizational resources when implementing CRM. I conducted five semistructured online interviews using six open-ended questions with firm leaders who have used strategies to manage change and organizational resources when implementing CRM. In a semistructured interview, the interviewer may pose a mix of open-ended questions based on the respondent's emergent global viewpoints (Merriam & Tisdell, 2016). For this study, I assigned each participant a confidential identifier in the following order: P1, P2, P3, P4, and P5. I used Microsoft® Teams to record and transcribe the interviews, and I used MindManager to capture key themes and identify additional queries or thoughts that emerged from participants' worldviews. I used MindManager® brainstorming software, NVivo 12 Pro, and Microsoft® Excel to categorize and analyze interview data.

For qualitative data analysis, I imported five case study interview transcripts into NVivo and began the discovery phase exploring the data and creating codes based on the qualitative data. Although a few themes stood out when interviewing, when I began manually coding, I started from scratch, creating codes, and reviewing each response line by line. I adopted this inductive strategy to avoid bias and determine what could arise from case studies. According to Merriam and Tisdell, as a researcher approaches the conclusion of their study, they operate primarily deductively seeking evidence to support their final set of coding categories.

Presentation of the Findings

The study's overarching research question was as follows: What strategies do firm leaders use to manage change and organizational resources when implementing CRM? I collected data via semistructured interviews, observations, and interview notes. To check internal validity and thus ensure rigor and robustness, I invited members to participate in member checking, which included reviewing their interview transcripts and my notes and enabling them to edit their responses and provide additional data. In between interviews, I listened to snippets of the recordings, read through the transcripts, and captured reoccurring themes or surprising insights in the mind-mapping software. Before data collection, I expected a few codes to emerge based on my research. Nonetheless, I sought experts from a purposeful sample, so I wanted to see what codes might arise from their responses. Consequently, I chose an inductive coding strategy and vacillated between an inductive and a deductive approach.

Once I completed the final interview, I uploaded the interview transcripts into NVivo and began open-coding the interviews line-by-line creating codes based on the qualitative data. Coding is an iterative process of comparing data, identifying similarities and differences, and classifying data (Saunders et al., 2016). I identified similar data patterns and created subthemes under the principal codes. I identified several codes from the initial coding of interviews. For further thematic analysis, I used NVivo and Microsoft Excel to identify the emerging themes and subthemes and the frequency of codes in different interview transcripts. In addition, I performed a word frequency query summary and visualized it as a word cloud in **Figure 2**.

Table 5*Number of New Codes by Participant*

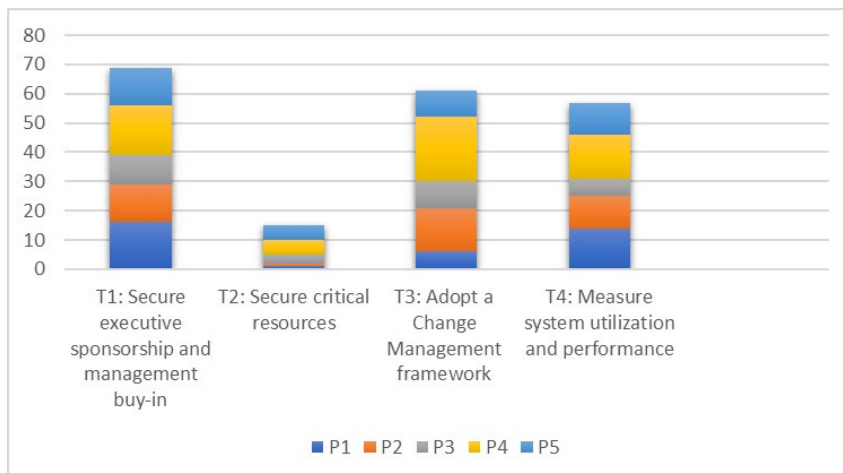
Interview	Participant	Number of codes	Number of new codes
1	P1	12	12
2	P2	12	3
3	P3	13	0
4	P4	11	2
5	P5	13	0

Table 6*Emerging Themes and Coding References*

Theme no.	Main theme	References
1	Secure executive sponsorship and management buy-in	69
2	Secure critical resources	15
3	Adopt a change management framework	61
4	Measure adoption, system utilization, and performance	57

Figure 3

Four Major Themes: Varied Degrees of Frequency-Based Significance



Theme 1: Secure Executive Sponsorship and Management Buy-In

Secure executive sponsorship and management buy-in was the first theme I derived from the data with (a) leadership/top management, (b) buy-in, and (c) executive visibility and decision making subthemes. Securing executive sponsorship and management buy-in is analogous to Step 4 of Kotter's change management model, which conveys the vision and strategy to managers, employees, and stakeholders to obtain buy-in. This theme was the most prevalent and significant of the four in this study, as each participant spoke fervently about the importance of executive sponsorship, leadership engagement, and management participation. **Table 7** shows the results for Theme 1, with a total of 67 references with leadership/top management, buy-in, and executive visibility, and decision making as subthemes (depicted in **Figure 4**).

Table 7*Emergent Theme 1: Secure Executive Sponsorship and Management Buy-In*

Subthemes	Number of sources	References
Leadership/top management	5	36
Buy-in	5	31
Executive visibility and decision making	2	2

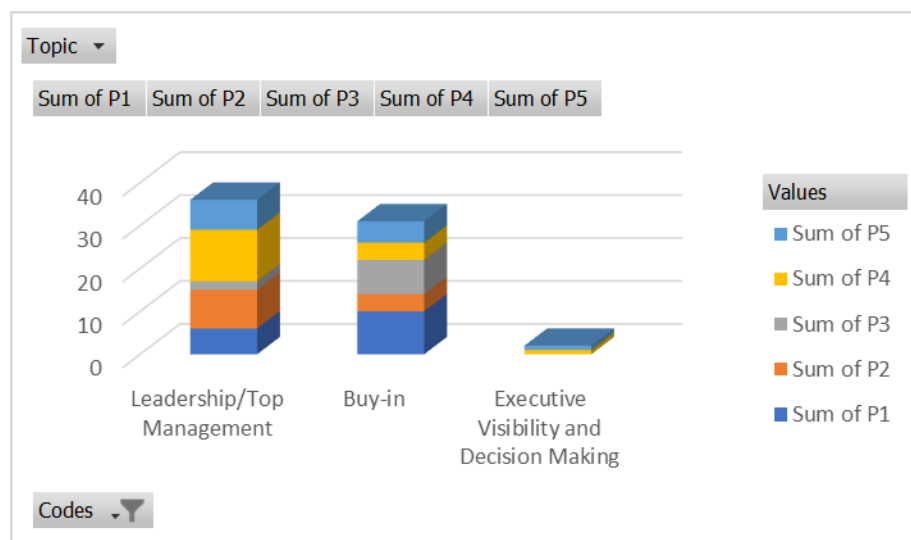
Figure 4*Executive, Leadership, and Management Subthemes**Executive Visibility and Decision Making*

Figure 4 depicts executive visibility and decision making, even though I observed insufficient data during interviews to qualify it as a significant subtheme. However, according to P4 and P5, obtaining executive approval for funding was easy because their organizations were culturally invested in CRM. Cultural investment, in both scenarios (in the case of P4 and P5), speaks to executive visibility, decision making, and employees

pushing for CRM instead of resisting it. P4 shared that their firm had invested in CRM twice. The second time, the firm secured a dedicated internal executive sponsor, engaged the right people, and hired a CRM implementation partner, which resulted in a more seamless implementation. According to P5, the sales president said, “We’re going to do this, no matter the cost,” as he could see the benefit of seeing what was happening within the sales organizations.

According to P5, their sales team yearned for CRM, so many were using some CRM tool they acquired independently. Sales did not wait for the corporation to implement CRM or for corporate mandates, resources, guidelines, process changes, or training. As the firm’s IT executive, P5 did not have to do any selling or lobbying on anyone’s behalf to manage change or organizational resources. Because CRM is not an IT initiative, according to P5, the sales organization should lead the charge rather than IT. In this case, the sales president was the champion and a major stakeholder. According to P5, “Having the business department champion, the president of the sales organization leading, was the best way to get it approved, and it did not take long because everyone knew that we were behind the times.”

P4 shared how their firm obtained the executive team’s buy-in on the business needs and use cases with metrics. According to P4, their firm measured how implementing CRM would result in greater adoption and utilization by the customers, suggesting that there would be an return on investment. They also identified potential efficiencies from implementing CRM. In P4’s firm, their team further created a road map identifying growth projections for the next several years and how the headcount needed

for CRM today would lead to reduced hiring later. While many organizations struggle with low, zero, or even negative returns on investment in complex information systems (Chen et al., 2021), P4 presented a clear and compelling business case to justify increasing headcount and hiring an integration partner, which received executive visibility and approval.

Leadership/Top Management

P1, P2, and P5 spoke of active leadership participation in CRM and showing executives' reliance on users for vital information in crucial decision making. P1 acknowledged that the executive and functional leadership teams rely on that individual or team to provide important information on what they need to deliver to the customer. The information P1 referenced is "elevated all the way to the top ranks of the company where the decisions are made" about budget, resources, and the company's direction—it is the "foundation for our business." P1 further stated that "when they input information, it impacts the forecast of the opportunity" and "we have to deliver." As the senior vice president of sales, P1 actively communicated and shared throughout the organization how c-suite individuals use CRM to support executive decision making.

As an executive vice president of sales with six sales vice presidents reporting to them, P2 said, "When it comes to our organization that is focused on making it happen" (i.e., sales communicating and educating customers to close business), "you can never communicate enough." In the preceding statement, P2 made a clear reference to executive leadership's responsibility in managing change and organizational resources when implementing CRM. When I asked P2 to share their most effective strategies, P2

said, “The most effective strategy was me paying attention to it as the leader of the organization.” P2 further expressed that strong executive sponsorship was a powerful driver for change.

Buy-In

P3 credited conducting preemptive research on the organization’s needs, reducing negativity, and garnering support for CRM. P3 talked about the role of psychology and how humans naturally resist change. Leadership listened to what people were griping about and their problems, trying to figure out how to address them. In addition to senior leaders listening and actively engaging in CRM, P3 observed success from “garnering the support from department heads and some of their key personnel.” For department heads, P2, P4, and P5 credited a business case for demonstrating the cost-benefit analysis that drove their buy-in, peers, and management-level subordinates.

Once engaged, they (P2, P4, and P5) paid attention to CRM as organizational leaders and executive sponsors aligned with management. They supported management in defining realistic goals and communicating those goals and objectives throughout the organization. While all participants covered the importance of buy-in, P4 said the initial buy-in across the executive team and extreme buy-in from resources are essential. However, it is also vital to ensure that “we continue to maintain support of the team once implementing the system.” Another critical strategic activity that P4 shared was that their organization created a business case and use cases and assembled executives and managers to pitch their plan to gain buy-in. P4 and P5 also emphasized the importance of

executives investing the appropriate time, allocating proper resources upfront, raising the volume, and increasing communications early.

According to P1, “If they believe in it, they will use it.” P1 “empowered people through active communication” (i.e., P1 drove buy-in by advocating for CRM to be the sales team’s communication vehicle). Like P3, P1 touched on psychology, neuropsychology, organizational behavior, and how employees can misconstrue urgency as a commanding leadership style. P1 believed that observing people’s behaviors to understand what motivates them instead of commanding them helped drive sustainable behaviors in a changed CRM environment. P1 and P3 implemented a subconscious reward system to manage change and motivate salespeople to use CRM. Nearly all participants spoke of motivating people and rallying department champions to assist with those efforts.

Theme 2: Secure Critical Resources

Secure critical resources was the second major theme that I derived from the data with (a) critical internal CRM resources, (b) critical external CRM resources, and (c) people subthemes. This theme is analogous to Step 2 of Kotter’s change management model, which is build/form the guiding team/coalition. In investigating the effect of including project managers on CRM, Deshmukh et al. (2020) discovered that project managers play a crucial role in managing personnel issues, which can lead to project failure. Like Deshmukh et al., P4 and P5 recognized not only the importance of project managers but also the importance of gathering crucial internal resources (i.e., internal dedicated CRM project managers, IT managers, department leads) and contracting an

external integration partner to ensure CRM's success. The internal project manager was responsible for updating executive leadership, keeping the project on schedule, and ensuring that teams contributed to the success of the project. P4's firm leveraged an integration partner whose employees were former employees of the CRM company.

Table 8 shows the number of sources and references for the second major theme while

Figure 5 is a graphical representation of the subthemes.

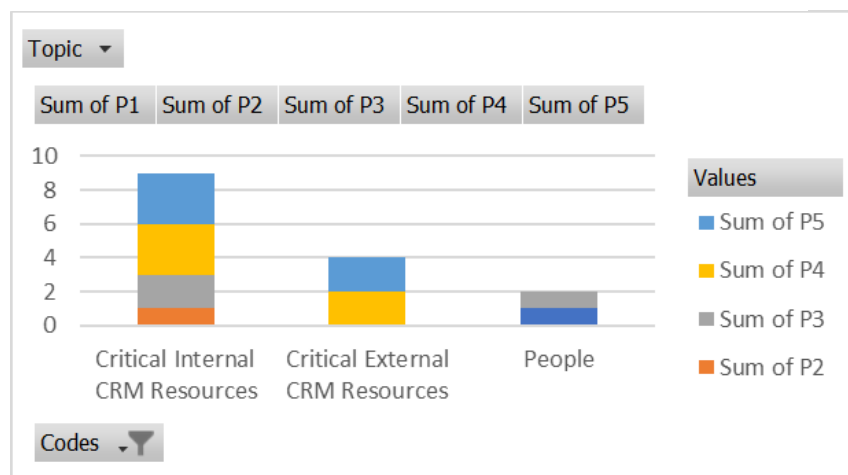
Table 8

Emergent Theme 2: Secure Critical Resources

Subthemes	Number of sources	References
Critical internal CRM resources	4	9
Critical external CRM resources	2	4
People	2	2

Figure 5

Critical CRM Resources Subthemes



When asked what strategies were the most effective in managing change and organizational resources when implementing CRM, participant P4 said their firm leveraged an integration partner with a proven track record and had an internal project manager who could drive collaboration. When asked the same question, P5 also shared that their firm hired an external CRM implementation partner and identified internal department champions, both were critical in managing the change and the resources. P1 said the most effective strategies is “Putting people first; making sure that people are in charge of their destiny, their future, their careers.” In P1’s corporate environment, it was crucial to comprehend the importance of CRM to individuals. CRM is essential for sales performance, and people view success in sales differently.

Success, according to P1, may entail commissions, growth as a subject matter expert, or advancement in the corporate hierarchy. Regardless of how people define success, when managing change and organizational resources when implementing CRM organizational leaders must integrate people, processes, and technology. When handled effectively, people believe what they see and feel, realize change is required, and are ready for the change process (Kotter et al., 2004). P4 had successfully identified top performers who volunteered to participate in CRM and exceeded expectations. And P1 and P3's firms focused on salespeople's problems—they used CRM to help salespeople be more efficient to achieve what they deemed to be success.

Last, compared to the other major themes, this theme was less prevalent in the frequency of occurrence yet significant, insightful, and relevant. The first three interview participants were sales executives whose responses focused primarily on their actions to

meet their sales goals and objectives. The last two interview participants were IT executives focused on business process transformations and creating a strategic plan for CRM and a road map. The IT executives defined new business processes, evaluated integration points into CRM, created project plans, and mapped out cultural changes. All these elements warranted an investment in a CRM integration partner, not simply in CRM licenses or up-front training.

Theme 3: Adopt a Change Management Framework

Adopt a change management framework was the third major theme that I derived from the data with the following subthemes:

- engage in business process transformation planning and documenting
- assess the vision and need for change
- define the goals and objectives
- develop a change management plan
- identify qualified vendors
- build a change management team
- create urgency
- communicate the change
- identify short-term wins

This theme naturally encompasses almost every step in Kotter's change management model shown in **Figure 1**. While I touched on many of these subthemes under other main themes, as I was constructing major themes and categories it became apparent that several participants adopted a change management framework. P4 and P5 repeatedly used

the term change management and described a systematic change management process. For example, P4 described their firm's change management process, which entailed (a) articulating the business problem, (b) constructing a plan with milestones, (c) getting the right executives engaged, (d) selecting an integrator, (e) engaging the broader team (i.e., users), (f) defining how work processes will change, (g) building a roadmap, and (h) measuring success. And P5's firm adopted a six-step process when implementing any new system: (a) setting realistic and actionable goals, (b) researching the right CRM solution, (c) finding department champions, (d) conducting a cost benefit analysis, (e) migrating and integrating data, and (f) training the team and testing the system. **Table 9** shows results for Theme 3, with a total of 65 references, while **Figure 6** is a graphical representation of the subthemes and participants' inputs. Additionally, according to P4, "Organizational change management is critical in any organization, whether introducing a new tool, changing a process, or bringing new leaders on board."

Table 9

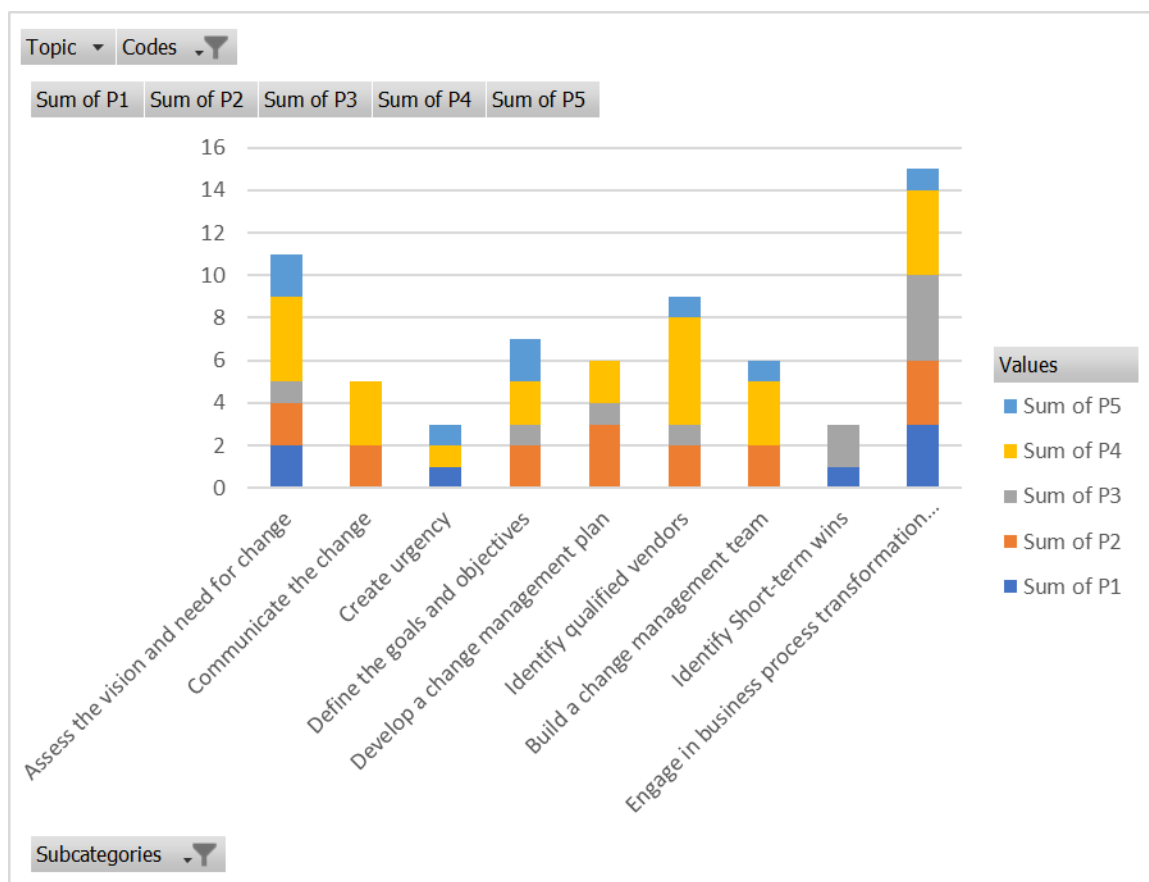
Emerging Theme 3: Adopt a Change Management Framework

Subthemes	Number of sources	References
Engage in business process transformation planning and documenting	5	15
Assess the vision and need for change	4	11
Define the goals and objectives	4	7
Develop a change management plan	3	6
Identify qualified vendors	4	9

Subthemes	Number of sources	References
Build the change management team	3	6
Create urgency	3	3
Communicate the change	2	5
Identify short-term wins	2	3

Figure 6

Change Management Subthemes



Assess the Vision and Need for Change and Define Goals

According to firm leaders in this study, implementing a CRM system in an SME necessitates cautious planning and effective change management to ensure the system's adoption and optimal utilization of organizational resources. For example, P4 and P5 emphasized the significance of change management with new tools and processes and detailed key steps of the change management model without being preempted or manipulated by the investigator. The firm leaders in this study adopted a change management framework by assessing the vision and need for change and defining goals. Leaders of SME organizations should begin by assessing the need for a CRM and identifying the specific business goals they wish to achieve. This evaluation assists in establishing a clear understanding of the reasons for change and lays the groundwork for effective change management.

When implementing CRM, nearly all participants cited developing a clear business problem and creating a strategic plan as a strategy for managing organizational change and resources. While P2, P3, P4, and P5 stated that a small committee worked on CRM firm-wide goals and objectives, P2, P4, and P5 expressed the importance of eliciting organizational members' feedback. P1, P2, and P4 added that it is essential to identify what data is important to various stakeholders. P2 ensured the goals were transparent and that the organization knew management was not the sole entity determining or driving the goals and objectives. At the management level, P2's team wrote the goals, prioritized them, and discussed how to accomplish them. In P4's firm, the change management team enumerated their key requirements, and their business

resources actively participated in this process, where they articulated business objectives and captured requirements.

Build a Change Management Team

According to SME firm leaders in this study, it is essential to establish a dedicated change management team comprised of high-performing individuals from various organizational functions. According to P5 the team should consist of internal department champions and sales: Sales will "be called upon to make sure that they signed off on the system" and "that it was built the way they wanted." P1 described how their organization embraced team members' differences and fostered creativity, acknowledging that some individuals are difficult to work with, which was all part of the change management process. P4 and P5 involved users who would be the primary system users. P4 was able to engage high-performing team members on the CRM change management team by carving out team members' time and requesting their peers to take on excess capacity. According to P4, "It required tons of work and input across several organizations: to obtain the executive team's buy-in to get team members who had other roles organizational support to commit to participating in the CRM project."

In addition to internal team members, P4 and P5 also contracted implementation partners from vendor selection through post-implementation to assist internal CRM project administrators in managing organizational change and resourcing when implementing CRM. P5 talked about the pivotal role their implementation partner played in organizational change management. P5 recalled the following:

If the partner had already worked with other folks in our industry, we would know that they could help us avoid potential pitfalls, you know, avoiding going down the wrong path, avoiding customizing something when you should just use something that's out-of-the-box.

P5's firm had been doing the same thing for 25 years, so they needed an external integration change agent experienced with change management. P4's firm leveraged an integration partner where "most of their employees were former employees of the CRM company, but that helped to ensure we were accurately documenting."

Develop a Change Management Plan and Identify Qualified Vendors

In the P4 and P5 organizations, executives assigned internal CRM project managers to oversee project planning activities. P4 and P5 also contracted implementation partners from vendor selection through post-implementation to assist internal CRM project administrators in managing organizational change and resourcing when implementing CRM. Each time P4's firm introduced a new feature or capability, they implemented a small CRM project "Because some of our use cases changed so significantly from pre-pandemic to 2020-2021 engagement." This mini-implementation was an extension of the organization's extreme communication culture. P4 said the following about the firm's CRM project managers, "They were the ears in the room to, you know, call the question if we were going down rabbit holes to refresh us on the parking lot; they tracked all major risks." The CRM project managers and the P4 and P5 firms tracked milestones, facilitated many meetings, and led vendor selection, so the role of the project manager was critical.

Four sources referenced vendor selection nine times during data collection. P2 had an expanded group participate in customer-driven, scripted demos. P3 set up tiger teams to evaluate vendors' CRM systems. P4 did it all: set up tiger teams, researched CRM solutions, invited an expanded user group to sit in on demos to capture their attention, and used scorecards to evaluate vendors. P5's firm's six-step change process entailed researching the right CRM solution. The firm selected a CRM and then identified department champions to embrace CRM and ensure it would succeed upon implementation.

Create Urgency and Communicate the Change

P2 and P4 executives noted their organization-wide CRM communications as an effective strategy for managing change and organizational resources when implementing CRM. P2 said raising the volume of communications, asking people to get involved before implementing CRM, and maintaining that communication cadence was vital to their system's success. P4 relied on extreme communication with the team and all those involved to identify and address significant challenges when implementing CRM. As the executive sponsor, P4 was always informed and knew when CRM activities occurred. When P4 needed to address challenging situations or individuals, P4 would conduct conversations at crucial moments. P4 would react urgently and respond with appropriate communications to support the project manager's efforts.

To manage change and organizational resources when implementing CRM, firm leaders had to be transparent and communicate expectations regarding project objectives, scope, and level of engagement to advance and ensure the project's success. P4 struggled

to balance the organization's participation and input during implementation. P4 attributed receiving too much input to causing the project to stall and veer off track: "Our guiding principles throughout should have been those business requirements." P5 described how their company relied on their implementation partner's experience and how crucial it was to heed their advice to avoid potential pitfalls or the incorrect path. An important insight from P5's interview was how the implementation partner communicated what worked when partnering with other companies in similar industries to avoid adverse outcomes.

Transform Business Processes and Identify Short-Term Wins

Businesses that empower, prepare, and demonstrate practical CRM usage to employees may experience more success than those requiring employees to log on. P1 and P2 are both sales executives who believe that CRM enhances how information is shared and can transform how people work. With over 100 employees, P2 wanted to ensure that users adopted and utilized CRM as "A tool that helps them manage their day." P3 considered requirements for business development professionals, capture managers, and sales engineers. P3 discussed defining rules and necessary items and understanding various divisions, functional roles, and stakeholders' business process requirements. In addition, P3 discussed examining efficiencies and inefficiencies.

P1 shared unconventional strategies for motivating their sales organization to use CRM to drive short-term wins. P1 told the sales team they would generate more revenue, make more commissions, and experience more growth using CRM. P3 spoke of how much salespeople hated to keep up with CRM. To get them past this hurdle, P3 provided

regular CRM training to improve the quality and increase the quantity of data going into CRM. According to P3, "They embrace the change until we change something else."

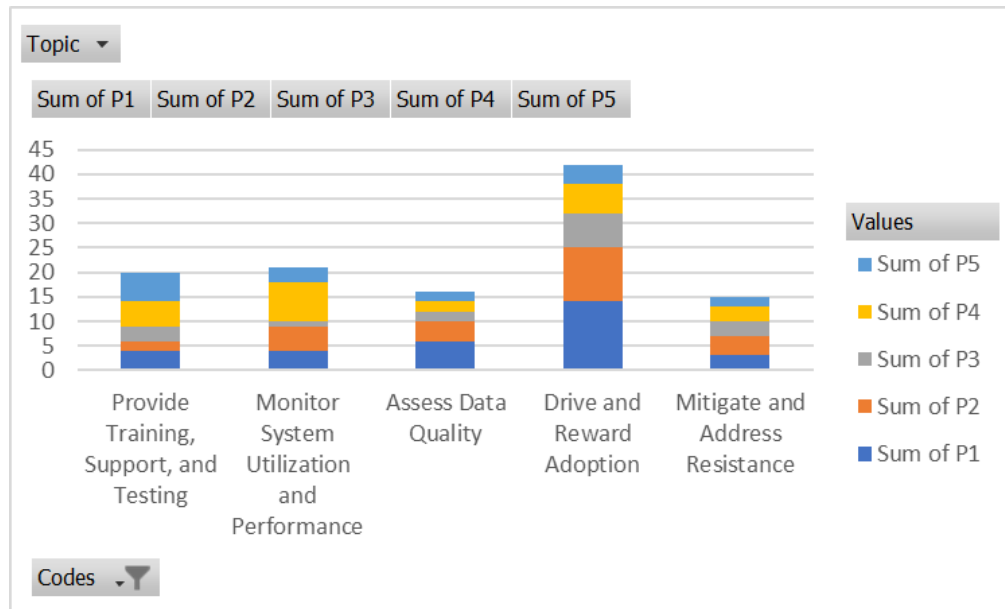
Theme 4: Measure Adoption, System Utilization, and Performance

Measure adoption, system utilization, and performance was the fourth theme that I derived from the data with (a) drive and reward adoption, (b) monitor system utilization and performance, (c) assess data quality, (d) provide training, support, and testing, and (e) mitigate and address resistance subthemes. Measure adoption, system utilization, and performance partially aligns with Step 7 of Kotter's change model, which is don't let up; sustain momentum and acceleration. Leaders in this study consistently communicated why a change was initially necessary. Ongoing training, periodic reporting, and consistent monitoring are essential to sustain change. **Table 10** shows results for Theme 4, with a total of 114 references, while **Figure 7** is a graphical representation of the subthemes and participants' inputs.

Table 10

Emergent Theme 4: Measure Adoption, System Utilization, and Performance

Subthemes	Number of sources	References
Drive and reward adoption	5	42
Monitor system utilization and performance	5	19
Assess data quality	5	18
Provide training, support, and testing	5	20
Mitigate and address resistance	5	15

Figure 7*System Utilization and Performance Subthemes****Provide Training, Support, and Testing***

To manage change and organizational resources when implementing CRM, the SME firm leaders in this study invested in training programs to help employees comprehend the CRM system's capabilities, how it enhances their daily work, and how it aligns with their corporate objectives and professional goals. Several executives (P1 and P3) said CRM was not an easy tool to understand: "CRM technology is not intuitive as you and I use Facebook or LinkedIn," according to P1. P1 said their sales team needed more technical savvy and proper training to overcome resistance. In some environments, executives (i.e., P2, P4, and P5) utilized early adopters and high performers to coach and support users through resistance and towards proficiency. To address usability and

facilitate training, P3 and P4 used work sessions to show users how to use CRM and to show CRM's capabilities.

P3 said communication, training, and education are essential, as "Addressing usability with training and education is probably one of the keys to getting past that hurdle to where they get excited to use it, and they know how to use it well." In training their organization, P3 further stated, "It was very apparent that most people did not know the CRM's capabilities." According to sales leader P3, good salespeople are more adept at developing customer relationships than performing administrative CRM tasks. In the P4 organization, "The implementation partner created all necessary training documentation." Additionally, IT maintains a knowledge base of current job aids, including comprehensive training material accessible by end users.

As an IT executive that hired an experienced implementation partner, P5's organization had support pre-implementation, during implementation, and post-implementation. In addition to having an implementation partner, P5 had "department champions that went all the way down to department managers that were very involved in the day-to-day building and configuring of this CRM system." One of their department champions was the president of one of their distributions who "We showed demos to make sure we were going down the right path." Although training and testing was the last step in P5's organization's change management process, there was clear evidence that as an executive P5 paid a great deal of attention to the system testing and training. The CRM implementation partner provided knowledge transfer and training, equipping employees with the skills necessary to utilize the CRM system following implementation.

Monitor System Utilization and Performance and Address Issues

To manage change and organizational resources when implementing CRM, the SME firm leaders in this study regularly monitored system implementation, system performance, usability, usage, and measured success. P1 inspects the sales teams' activities in CRM on a weekly basis and communicates with the team on why proper usage and tracking of opportunities is critical. According to P1, "I look at I look at the inaccuracies and forecasts and customer information sales activities"; "... I see who's paying attention to it and who's not." P2 had the following to say about monitoring, "Part of the monitoring progress is having one on ones and discussions with the managers that are most keenly involved in the CRM system." Monitoring performance implies that there are governance and policies in place.

Regarding system governance, P2 had the following comment:

You really need a governance board or a government structure that makes sure that people know the pieces that they must put into CRM. Make sure that you know there are some policies so when you enter a note about a customer visit or an opportunity, there are some essential things that we want to see so it's important to capture that in like a policy or procedure.

For the sales team, as retold by P3, updating CRM was an afterthought. When asked about some of the key challenges experienced when implementing CRM, P3 said the following:

CRM is an amazing tool, but most people in a company really don't understand the power behind CRM. There are multiple CRMs out there, but there are deep

titans, and those titans can run an entire business from the front end to the back end through financials, supply chain, and product development. There are so many things that CRM can do, and I think that the biggest challenge is their understanding and ability to use it correctly.

One of the strategies P4 used to manage change and organizational resources when implementing CRM was "identifying how we will measure success once this system is implemented." P4 implemented two CRM system implementations. With the first CRM implementation, according to P4, "we failed with identifying what would be considered our measure of success." They aimed to launch the system and ensure people were using it, which P4 later recognized as an ineffective indicator of success.

"Sometimes people only want to share stuff, you know, through their leadership chain," according to P5. So P5 had regular sessions with leadership so force issues to the surface, address and resolve them. P5's implementation partner helped the organization navigate implementation challenges, and learn from other projects, so relying on their implementation partner's experience was big. P4 and P4 established key performance indicators to evaluate the system's efficacy and to ensure that it correlated with the intended goals.

Assess Data Quality

To manage change and organizational resources when implementing CRM, the SME firm leaders in this study attributed decision making reliability to data accuracy. Consistent, accurate, and complete data resulted in positive analyses and better decision making. As the sales senior vice president, P1 considered the sales representative as the

leader working on a customer project. The executive team supporting that sales leader relied on that individual "to provide very important information on what needed to be delivered to the customer," according to P1. Data quality is critical because the information is visible throughout the "top ranks of the company where the decisions are made." CRM data is the "foundation for our business," according to P1.

With accurate data, businesses can customize customer interactions and communications, resulting in stronger business relationships and more personalized and targeted engagements. P2 shared that they have over 1,000 customers that customer success representatives track so, "helping them see the value is much more than just management oversight." Users' confidence in a CRM system is directly proportional to the accuracy of its data. "I'm constantly questioning the quality of the data, the quality of the pipeline, the velocity of the pipeline moving from stage to stage. Data quality is something that is stay really concerned about." One of the primary strategies P3 used to manage change and organizational resources when implementing CRM was deciding what data was essential by functional role and configuring CRM to meet users' expectations.

The participants in this study also insinuated that data quality, complexity, and business priority impacted their ability to integrate with other enterprise platforms. According to P2,

Salesforce doesn't plug into any other systems. I think an opportunity for tomorrow is to look at how we can turn this data into actionable intelligence for us and perhaps lead to better marketing campaigns or better follow-up with

customers. There are boundless opportunities for our Salesforce system to connect to some of our other systems to create a larger ecosystem of customer engagement and, of course, sales engagement.

P2 implemented a standalone Salesforce CRM that did not integrate with other enterprise systems.

One of the strategies P4 used to manage change and organizational resources when implementing CRM was trying to identify integrations early. P5 experienced challenges with integration points into CRM. P5 shared the following:

We had to get a lot of data out of the CRM. We had to build quite a few reports that the business needed to be able to monitor the business. So, there was a lot of work around all of that, and really, when it came to integration time, making sure all of those were working together was crucial.

P5 further shared the following: "Once they would get into production and then look at the report, they wanted modifications. There was a lot of back and forth even after we went to production." The issue was "the way we went about delivering" and the "organizational cultural change," as the organization was doing "something they had never done before." While P1, P2, and P3 barely scratched the surface in mentioning integration within the context of data quality, P4 and P5 worked alongside their integration partners to identify integration requirements and plan for integration activities despite the complexities.

Drive and Reward Adoption

Executives in this study played a crucial role in promoting and rewarding CRM adoption by consistently communicating the importance of CRM and articulating the system's benefits and how they align with employee goals and organizational objectives. P2 facilitated adoption through training and support. P2 selected a subset of the organization for pre-training and made sure the rest of the organization knew who they were so they could reach out to them for guidance and support. P2 added, "I was strong proponent of once we reached this point in the process that we to take time out to celebrate what we've accomplished." Accordingly, P2 ran contests to encourage users to view training videos, a tactic they attribute to the company's increased user adoption.

According to P1, people who comprehended CRM's value and recognized that it would help them become more efficient were more prone to adopt CRM. P3 said it was a "challenge getting people to use it correctly"; "it is not something that happens overnight." The number one metric P4 used to determine CRM success was user adoption:

We're leveraging that tool and have pulled in tons of data business data where we've been able to create a scorecard for our customers like a health score where we can measure their satisfaction, measure sentiment, measure how they're adopting our tools and systems. We use all that data collection and combine it with the adoption metrics for our teams to truly determine the success and can predict patterns and behaviors of our customers based on all those contributing metrics.

Executives can increase CRM system adoption by involving employees in the implementation process, providing ongoing training, and helping to cultivate a sense of ownership and engagement among employees.

Mitigate and Address Resistance

In this study, resistance was not a prevalent topic among participants, but there were some insights worth scholarly discussion. To manage change and organizational resources when implementing CRM, the executives in this study mitigated and overcame resistance by communicating the need for change and emphasizing its effects on employees. According to P1, in some cases, team members were not comfortable sharing their activities or information in CRM; they had trust issues. Instead of ignoring resistance, P1 mitigated resistance by shifting to a compassionate and nurturing leadership style.

Although P2 and P3 did not use the term resistance, both participants spoke of how their sales teams were initially reluctant to use CRM and that they mitigated that reluctance by communicating CRM's value and offering training and support. P4 and P5 were in challenging environments with static processes where people wanted to continue doing business the same way despite expert advice. According to P5, New leadership "realized it's not cheaper to do it yourself if you've never done something; it's actually going to be longer because you don't know what you're doing." Another tactic that these leaders employed to mitigate resistance was to build a change team and identify champions within organizations. These were diverse individuals relative to position and level who were high performers and had charisma and the ability to coach and motivate

others. In addition to actively and frequently listening to employees' needs and concerns, these executives nurtured a creative and positive environment conducive to success.

Application to Professional Practice

In this qualitative multiple case study, I explored strategies firm leaders used to manage change and organizational resources when implementing CRM. The applicability and relevance of the study's insights and evidence-based findings can help SME firm leaders increase efficiency, effectiveness, and business success. Businesses can use these insights to adapt not only their CRM implementation strategies but their activities leading up to implementation, recognizing not only industry challenges but also organizational ones. SME firm leaders can also use the findings of this study as valuable data to support decision making, whether implementing a CRM solution or different technology solution, restructuring organizational processes, or implementing a significant change.

Decision makers can utilize these findings to make informed decisions more likely to result in positive outcomes and mitigate risks. Implementing change within an organization can be difficult. Change management frameworks, models, and strategies can be the lens that practitioners use to approach large-scale, complex, and costly technical implementations, such as CRM. Utilizing these findings, firm leaders can more effectively navigate the complexities of CRM implementations, change management, and change resistance, increasing the likelihood of success. It was enlightening to learn about external CRM integration partners and the crucial role they performed. A partnership with an integrator may be advantageous for SMEs implementing CRM for the first time.

Research findings can provide insights into prevalent organizational challenges and suggestions for addressing them. These difficulties may involve executive leadership, management, a change management team, external integration experts, and full employee engagement. By employing research-based solutions, businesses can surmount these obstacles and create a more collaborative, creative, productive, and trusting and sustainable organizational culture. The relevance of study findings to improved business practice rests in their capacity to inform decision making, guide strategy development, improve outcomes, address obstacles, support change management, and promote continuous improvement. By leveraging research insights, firm executives can make more informed decisions and succeed tremendously in an ever-competitive business environment.

Implications for Social Change

When firm leaders properly manage change and organizational resources when implementing CRM, the positive implications for social change include data-driven informed decision making; increased productivity; and improved data quality, access, and security. These favorable results contribute to a more customer-focused, efficient, and socially responsible organizational culture. Businesses can more efficiently address customer questions and concerns with a centralized CRM. This enhanced customer service can boost trust, benefiting the business and society by encouraging positive customer interactions. Implementing CRM requires executive sponsorship and commitment, cross-functional collaboration, organizational alignment, and an augmented workforce (employees, subcontractors, and consultants). A collaborative approach

promotes communication and knowledge sharing among various organizational departments and levels.

As a team of expanded resources collaborate to implement and utilize CRM, they must foster an environment of consistent communication over time. These organizational changes can extend beyond CRM and impact team dynamics, social interactions, and collaboration in other business areas. Moreover, CRM systems can automate manual, time-consuming administrative tasks and streamline business processes, resulting in greater productivity and efficiency. CRM users can focus on activities that add value, such as building customer relationships and solving problems. This enhanced productivity can improve resource utilization and economic growth, which will have a positive effect on society.

Recommendations for Action

This qualitative multiple case study explored strategies firm leaders used to manage change and organizational resources when implementing CRM. When implementing CRM, the firm leaders in this study (a) secured executive sponsorship and management buy-in; (b) secured critical resources; (c) adopted a change management framework or model; and (d) measured adoption, system utilization, and performance. With 50% of organizations unsuccessfully implementing CRM (Meena & Sahu, 2021) and 70 to 80% of CRM projects failing, being abandoned, or never launching (Chen et al., 2020; Delpechitre et al., 2019; Deshmukh et al., 2020; Ngo & Vu, 2021), SME firm leaders should note this study's results regarding successful CRM implementations. In addition, most existing CRM literature highlights CRM project failure, while effective

implementations receive less attention (Refer to **Table 2** and **Table 3**). Given the investments businesses have made in CRM systems, the CRM failure rates are concerning.

The study revealed that firm leaders would benefit from adopting a change management model when implementing CRM. It is worth noting that McLaren et al. (2023) critiqued and challenged Kotter's change model because of how building urgency to support change initiatives can increase employee anxiety and stress. Instead, McLaren et al. (2023) "encourage change practitioners to move towards a more appreciative (and socially responsible) approach to change management." McLaren et al. urged practitioners to consider a more socially responsible change approach and to create urgency by communicating a compelling reason for the future state.

Before careening forward and treating CRM like just another big project, firm leaders should embrace change management and prepare the organization for change. Firm leaders should consider the following strategic activities to manage change and organizational resources when implementing CRM:

1. Identify the business need
2. Define and communicate clear objectives
3. Obtain feedback, incorporate, and refine objectives
4. Secure executive sponsorship and funding
5. Secure stakeholders' buy-in and management commitment
6. Plan and allocate critical CRM resources (i.e., identify the change management team)

7. Adopt a change management framework
8. Partner with a CRM integrator to determine system requirements and conduct vendor selection and due diligence
9. Configure and test system
10. Train users
11. Provide change management support
12. Implement system
13. Monitor progress, survey organization and make continuous improvements
14. Provide ongoing training

I will share the findings of the study with sales and marketing professionals, CRM professionals (i.e., integration partners), IT professionals, and corporate executives. I also plan to disseminate the findings of this study to SMEs, educational institutions, a CRM system integrator that partners with Microsoft Dynamics 365, and companies like Gartner and Forrester Research that could benefit from them via academic journals and trade journals. I am amenable to sharing my insights on the strategic importance of managing change and organizational resources when implementing CRM.

Recommendations for Further Research

Numerous contemporary arguments support CRM as an indispensable business tool (i.e., Jager, 2021; Shukla & Pattnaik, 2019). Some of the critical concepts prevalent in recent CRM research include using CRM to improve customer satisfaction, the adverse effects of CRM usage, CRM's impact on business innovation and processes, CRM project failure with limited focus on successful implementations, top management

support, organizing around CRM, CRM implementation, and CRM usefulness. However, there is limited empirical research on successful CRM integrations with emerging technologies (Meena & Sahu, 2021; Tazkarji & Stafford, 2020) and research showing the influence of CRM on sales performance (Aydin & Akyollu, 2021; Chen et al., 2021; Elfarmawi, 2019; Wang & Lien, 2019). Some additional areas that researchers may have yet to explore are the socioeconomic impact of CRM adoption, industry-specific CRM applications, and CRM implementations. Researchers could investigate the effects of CRM on employment functions, workforce dynamics, and CRM's social and economic implications. Regarding industry-specific CRM applications, P4 and P5 participants in the study benefited from working with an integrator with experience working with clients in their industry. Because of the integrator's experience, they assisted the business in defining requirements and system configuration.

I recommend that researchers consider focusing their studies on any major enterprise-wide successful system implementation of their choosing (i.e., CRM, ERP, or CPQ). Researchers should consider using Kotter's change model to ground their study. If not Kotter's model, perhaps another contemporary change management model or pricing model (i.e., Porter's Generic Strategies). There is a dearth of research that elucidates the strategies external project managers and system integrators employ to implement enterprise-wide complex systems in partnership with corporations. I recommend that researchers target B2B system integrators who have had experience working with a myriad of companies implementing complex B2B technical systems.

Reflections

This topic piqued my interest because there was evidence of an apparent business problem that could potentially impact my livelihood, my family, my employer, our customers, my community, and the global economy. When I began researching contemporary business problems, I was alarmed by the number of studies on CRM failure. From 2000 to 2020, researchers published 104 studies on CRM failure (Meena & Sahu, 2021). I was interested in this topic because of CRM's practical relevance as a contemporary global business tool. Analysts are expecting CRM spending to reach USD 80 billion by 2025 (Grand View Research, 2021). Yet, an estimated 60-80% of CRM projects fail (Deshmukh et al., 2020).

For this study, I minimized potential biases throughout the interview process by not volunteering my perspective and not influencing participants' responses. I report to the CEO as a business development and capture executive overseeing a Bid Operations organization. Bid Operations, and the entire enterprise, is reliant on the customer-facing sales organization for valid customer insights to prepare highly competitive bid responses. This critical customer intel is housed in CRM, and it must be current. With current customer information, organizations can effectively target customers by different factors (i.e., demographics, preferences, purchasing history, and location).

Based on the findings from this study, I understand the strategies that firm leaders used to manage change and organizational resources when implementing CRM. Using Kotter's change management model, firm leaders can more effectively navigate the complexities of large-scale change initiatives and encourage CRM adoption by

appropriately positioning CRM's value instead of mandating usage. After concluding this research, the concepts that have influenced my thinking the most are the positive impact of change management models and system integrators on CRM implementations. Some businesses need to pay more attention to potential CRM implementation difficulties and consider the need for expert support and a structured methodology. The companies explored in this study considered outside help and change management and understood the benefits. Having completed the study has allowed me to contribute to successful SME CRM implementations, not just in Texas but around the world.

Conclusion

This qualitative multiple case study explored strategies firm leaders used to manage change and organizational resources when implementing CRM. Firm leaders' difficulties managing change and organizational resources when implementing CRM, resulting in failed large-scale change initiatives, brought about the need for this study. Firm leaders should pay attention to CRM and how successful firms implement CRM because their CRM implementation process will impact their organization and their bottom line. Implementing a CRM system requires a significant capital investment in software and infrastructure and variable expenses for periodic system testing, training, and staff augmentation. Change management initiatives are inherently fraught with resistance. Addressing resistance requires a people-centric, empathic approach, which warrants proper execution. Firm leaders should regard CRM implementation as an ongoing process of continuous refinement.

By paying close attention to the people (various stakeholders, departments, managers, users, and organizations) before and during implementation, firm leaders can lay the groundwork for a successful CRM change initiative. Firm leaders are the key. Their engagement and oversight contribute to realizing CRM's full potential for enhancing customer relationships, driving business growth, and achieving organizational goals. Implementing CRM involves multiple teams, such as executives, IT, sales, marketing, and operations. This collaborative team must have a cohesive change management strategy, be aligned, receive consistent messaging from firm leaders, and would benefit from CRM integration experts' guidance to ensure the implementation's overall success.

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Appendix A: Interview Protocol

I will use the interview protocol to increase the credibility and reliability of the data collection. The goal of the interview is to answer the research question, which is what strategies do firm leaders use to manage change and organizational resources when implementing CRM? I will complete the following steps to conduct individual semistructured interviews using video conferencing.

1. Provide an overview of the research topic, purpose, and the anticipated interview duration.
2. Inform participants that I value their time and experience and appreciate their participation in my study.
3. Review the informed consent form and ask participants if they have questions.
4. Explain to participants that their participation is voluntary and that they may withdraw from the study at any time, along with the withdrawal procedure.
5. Reiterate to participants that the interview will be recorded and analyzed.
6. Explain that participants' names will be confidential.
7. Explain that data resulting from the interview will be stored on my password-protected personal cloud-based google drive for five years.
8. Ask participants if they have any questions.
9. If there are no questions, I will state that I will start recording.
10. Following the question-and-answer period, I will remind participants that I will provide an interview summary for their review.
11. Thank participants for their time and participation.

Appendix B: Interview Questions

1. What strategies do you use to manage change and organizational resources when implementing CRM?
2. What strategies were the most effective in managing change and organizational resources when implementing CRM?
3. What strategies were the least effective in managing change and organizational resources when implementing CRM?
4. What were some of the key challenges you experienced when implementing CRM?
5. How did you identify and address major challenges when implementing CRM?
6. What additional information would you like to share about your strategies for managing change and organizational resources when implementing CRM?