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MASTER'S THESIS

**IMPROVING THE QUOTING PROCESS IN A SELECTED
COMPANY USING A CUSTOMER RELATIONSHIP MANAGEMENT
SOLUTION**

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ABSTRACT

Customer Relationship Management systems frequently fail to meet complex business requirements despite significant organizational investment. This thesis examines how organizations can bridge the gap between standard CRM functionality and complex business process requirements. Through a case study of quote process optimization in a company using Microsoft Dynamics 365, the research identifies key success factors: combining CRM configuration with external tool integration, meaningful user engagement, and treating optimization as continuous work rather than a one-time project. The findings demonstrate that resolving functionality gaps requires both technical solutions and organizational change management, providing practical guidance for maximizing CRM value.

KEY WORDS: Customer Relationship Management, CRM implementation, quote optimization, gap analysis, change management

SUSTAINABLE DEVELOPMENT GOALS



POVZETEK

Sistemi za upravljanje odnosov s strankami pogosto ne izpolnjujejo kompleksnih poslovnih zahtev kljub znatnim organizacijskim naložbam. Magistrsko delo proučuje, kako lahko organizacije premostijo vrzel med standardno funkcionalnostjo CRM in kompleksnimi zahtevami poslovnih procesov. Na primeru optimizacije procesa ponudb v podjetju, ki uporablja Microsoft Dynamics 365, raziskava identificira ključne dejavnike uspeha: kombinacijo konfiguracije CRM z integracijo zunanjih orodij, smiselno vključevanje uporabnikov ter obravnavo optimizacije kot trajnega procesa. Ugotovitve kažejo, da reševanje funkcionalnih vrzeli zahteva tako tehnične rešitve kot organizacijsko obvladovanje sprememb.

KLJUČNE BESEDE: upravljanje odnosov s strankami, implementacija CRM, optimizacija ponudb, analiza vrzeli, izboljšanje poslovnih procesov

CILJI TRAJNOSTNEGA RAZVOJA



TABLE OF CONTENTS

1	INTRODUCTION.....	1
2	CUSTOMER RELATIONSHIP MANAGEMENT	3
2.1	Definition and Core Concepts	3
2.2	CRM Functionalities and Standard Capabilities	4
2.3	CRM Configuration	6
2.4	CRM Implementation Strategies	7
3	ADDRESSING CRM FUNCTIONALITY GAPS	8
3.1	Business Process Improvement	8
3.2	Gap Analysis and Resolution.....	10
3.3	Change Management in CRM Optimization	13
3.4	Quote Generation as a Critical CRM Gap.....	14
4	METHODOLOGY.....	16
5	IMPROVEMENT OF THE QUOTING PROCESS IN A SELECTED COMPANY	18
5.1	Organizational Context.....	18
5.2	Functionality Gap Identification	19
5.3	Solution Development and Implementation.....	21
5.4	Outcomes and Benefits.....	27
6	DISCUSSION	32
6.1	Key Findings	32
6.2	Theoretical Contribution	34
6.3	Practical Recommendations	35
6.3.1	Preparing for CRM Implementation.....	35
6.3.2	Addressing Functionality Gaps	37
6.3.3	Summary of Key Recommendations	38
6.4	Limitations	38
7	CONCLUSION.....	39
	LIST OF KEY LITERATURE	40
	REFERENCE LIST	41
	APPENDICES	1

LIST OF TABLES

Table 1: Gap Analysis Stages.....	10
Table 2: Functionality Gap Resolution Strategies.....	12
Table 3: List of interviewees	17
Table 4: Summary of Identified Functionality Gaps.....	21
Table 5: Summary of the key improvements and their impacts across all four outcome areas.	31
Table 6: Mapping of Theoretical Framework to Empirical Findings and Recommendations	33
Table 7: Summary of Key Recommendations	38

LIST OF FIGURES

Figure 1: Solution Architecture for Quote Process Optimization	24
Figure 2: Quote form before optimization, showing reliance on multiple static templates.	28
Figure 3: Quote form interface after optimization	28
Figure 4: Quote Generation Process Flow Comparison.....	29

LIST OF APPENDICES

Appendix 1: Povzetek (Summary in Slovene Language)	1
Appendix 2: Interview with Interviewee 1	2
Appendix 3: Interview with Interviewee 2.....	5
Appendix 4: Interview with Interviewee 3.....	7
Appendix 5: Interview with Interviewee 4.....	9

LIST OF ABBREVIATIONS

ADKAR – Awareness, Desire, Knowledge, Ability, Reinforcement

B2B – Business-to-Business

BPI – Business Process Improvement

CLV – Customer Lifetime Value

CRM – Customer Relationship Management

ERP – Enterprise Resource Planning

IT – Information Technology

SFA – Sales Force Automation

SME – Small and Medium-sized Enterprise

1 INTRODUCTION

The digitalization of business operations has changed how organizations manage customer relationships at scale. As businesses increasingly relied on data-driven decision making and automated processes, the traditional approaches to customer relationship management evolved into sophisticated information technology solutions. Customer Relationship Management (CRM) is one such solution for organizations seeking to systematically manage customer interactions, optimize sales processes, and leverage customer data for competitive advantage.

CRM can be understood as "the building of a customer-oriented culture by which a strategy is created for acquiring, enhancing the profitability of, and retaining customers, that is enabled by an IT application; for achieving mutual benefits for both the organization and the customers" (Rababah et al., 2011a, p. 4). This comprehensive definition captures the two sided nature of CRM as both a business philosophy focused on customer-centricity and a technological solution that enables systematic management of customer relationships and data.

Modern CRM systems promise enhanced sales efficiency and customer insights. They are advertised as a tool to achieve a competitive advantage for strengthening customer relationships (Nguyen et al., 2007). However, implementation outcomes contradict these expectations. Research shows 70-80% of CRM implementations fail to meet its organizational goals (Tazkarji, 2020), while executive surveys suggest that up to 90% consider their CRM systems to be failing to drive business growth in some form (Edinger, 2018). This gap between promise and performance reflects fundamental challenges in adapting standard CRM functionality to complex organizational requirements that demand extensive customization beyond the scope of the initial implementation.

Implementation challenges can be observed in organizations where standard CRM capabilities cannot adequately support their specialized business processes. These functionality gaps, the visible disconnects between a company's business requirements and the system's ability to address them, are a well-recognized challenge in enterprise system implementations (EstesGroup, 2023). Quote generation is an example of such a challenge. Organizations require efficient solutions for producing multiple quotes with minimal manual intervention, professional visual presentation, and comprehensive customer decision-making information. However, standard CRM capabilities often cannot meet these requirements without substantial configuration (Wong, 2020).

This thesis examines these challenges through a detailed case study of a company that implemented Microsoft Dynamics 365 in 2018. Despite years of system usage, user dissatisfaction led to system avoidance and adoption of alternative tools, creating fragmented workflows that undermined the goal of having standardized process. The quote generation process became particularly problematic, requiring many different document templates and lacking the dynamic adjustment functionality needed for international operations. Management

recognized the need to address these issues through a comprehensive process improvement and system optimization project.

Addressing this required reforming the entire lead-to-order process, from lead creation, opportunity qualification, quote generation, to order conversion. This case represents the ongoing nature of CRM optimization rather than a one-time implementation, highlighting how CRM success depends on continuous adaptation to the growth of organizations and changing market demands

Extensive research has examined what makes initial CRM implementations succeed or fail (Almotairi, 2009; Payne & Frow, 2005). Less attention has been given to what happens after implementation, when businesses grow and processes evolve, functionality that was adequate at launch can become insufficient. Academic guidance on addressing these post-implementation gaps remains limited (Meena & Sahu, 2021; Wahlberg et al., 2009), despite evidence that long-term CRM value depends on continuous adaptation rather than one-time implementation (Kumar & Reinartz, 2016).

The purpose of this thesis is to contribute to closing this research gap by providing insights that help organizations maximize return on their CRM investments and avoid the costly consequences of system underutilization and user avoidance behaviors.

To achieve this purpose, the thesis addresses the following research question:

- How can organizations successfully bridge the gap between standard CRM functionality and complex business process requirements in a post-implementation context?

To answer the research question, the goals of the thesis are to:

- Examine existing literature on CRM process optimization, user acceptance of system modifications, and business process improvements to establish the theoretical frameworks for understanding functionality gap challenges.
- Identify and categorize the types of gaps that exist between standard CRM capabilities and complex business process requirements, based on literature and empirical evidence.
- Analyze the technical, organizational, and user-related factors that enable successful resolution of CRM functionality gaps through a detailed case study of quote process optimization.
- Evaluate different approaches to addressing CRM functionality gaps, including technical configuration, hybrid solutions, and change management strategies.
- Provide practical recommendations and key considerations for CRM process optimization that can inform similar initiatives in other organizations.

This research combines literature review with case study analysis to examine how organizations successfully bridge CRM functionality gaps. The theoretical foundation draws from academic literature on CRM implementation, user acceptance models, and business process improvement

to establish frameworks for understanding functionality challenges. The empirical component presents a detailed case study of quote process optimization within Microsoft Dynamics 365, supported by semi-structured interviews with key stakeholders. This mixed-method approach enables theoretical synthesis combined with practical insights to develop both conceptual understanding and actionable guidance for CRM process optimization initiatives.

This thesis is organized into seven chapters. Following this introduction, Chapter 2 establishes the theoretical foundation by examining Customer Relationship Management concepts, functionalities, and implementation strategies. Chapter 3 addresses frameworks for resolving CRM functionality gaps, including gap analysis, business process improvement, change management, and the specific challenge of quote generation. Chapter 4 presents the research methodology. Chapter 5 contains the empirical analysis of quote process optimization in the selected company. Chapter 6 discusses findings, presents recommendations, and acknowledges limitations. Chapter 7 concludes by summarizing key contributions.

2 CUSTOMER RELATIONSHIP MANAGEMENT

When the selected company implemented Dynamics 365 in 2018, they expected standard CRM functionality would support their quote generation process. Five years later, salespeople were avoiding the system entirely, manually creating quotes in Word because standard features couldn't handle the complexity of their international business processes. This difference between vendor promises and operational reality represents a broader CRM pattern. Systems marketed as comprehensive solutions consistently fail to support specialized business processes, unique to a company or even industry. This chapter explains why this gap exists by examining what CRM systems are designed to do in comparison to what businesses actually need.

2.1 Definition and Core Concepts

Customer Relationship Management encompasses both a business-oriented dimension and a technological dimension, creating a foundation for analyzing system capabilities and limitations. Rababah et al. (2011a, p. 4) provide a comprehensive definition: "the building of a customer-oriented culture by which a strategy is created for acquiring, enhancing the profitability of, and retaining customers, that is enabled by an IT application; for achieving mutual benefits for both the organization and the customers." This definition captures CRM's dual nature as both a strategic business approach and a technological solution.

The strategic dimension focuses on customer-centricity. Roberts-Phelps (2001) identifies three core strategic elements: customer retention, development of customer potential, and strategic customer selection. Hassan (2015) demonstrates the strategic importance through his analysis of Shell Pakistan, where 20% of customers generated 80% of company revenue, illustrating why systematic customer management through CRM systems becomes strategically essential.

The technological dimension provides infrastructure for implementing customer-centric strategies at scale. Bose (2002) describes this through the contrast between small grocery stores, where employees naturally know customers personally, and large organizations where technological solutions must replicate this personalized experience. While CRM systems aim to provide comprehensive customer management capabilities, the multitude of business contexts means standard functionality struggles to address all organizational needs. Fletcher (2001) argues that technological solutions built in a "one size fits all" manner cannot effectively address unique business processes. This struggle to replicate personalized relationship insights through general-purpose technology is what constitutes a functionality gap.

2.2 CRM Functionalities and Standard Capabilities

In order to understand how functionality gaps emerge in the first place, requires an understanding of what CRM systems are designed to do and what their capabilities typically are. This section explores the primary functional areas of CRM platforms and examines the distinction between standard capabilities and customization requirements. This distinction is central to understanding why organizations frequently encounter gaps between system functionality and business needs.

Modern CRM platforms come with three primary functional areas that work together to support customer relationship management: operational processes, analytical capabilities, and collaborative functions. Parvatiyar and Sheth (2001) identified these areas in their foundational CRM process framework, noting that successful implementations require integration across all three dimensions. Each dimension serves distinct purposes while depending on the others for overall system effectiveness. Operational CRM is what forms the foundation of most implementations, automation and streamlining customer-facing business processes. This area focuses on day-to-day activities that sales, marketing, and service personnel perform when interacting with customers. Sales force automation is the most widely adopted operational component which supports the entire sales process from lead capture through order finalization. Marketing automation enables targeted campaign execution and lead generation and qualification. Service automation supports customer questions, problem resolution, and ongoing support.

Sales force automation (SFA) within Operational CRM is the functionality that directly supports the sales processes central to this thesis. SFA modules typically provide lead management capabilities for capturing and qualifying potential customers, opportunity management for tracking deals through pipeline stages, contact and account management for organizing customer information, and quote generation functionality for creating customer proposals. These capabilities aim to standardize sales processes, improve visibility into pipeline status, and reduce administrative burden on sales personnel (Bose, 2002). However, the effectiveness of SFA functionality depends significantly on how well standard capabilities align

with the given business specific sales processes. This is a challenge which is particularly evident in quote generation functionality examined later in this thesis.

Analytical CRM transforms data into business insights that support informed decision-making. By consolidating customer information from multiple sources and interaction points, analytical capabilities enable customer segmentation, lifetime value analysis, sales performance measurement, and trend identification. Ranjan & Bhatnagar (2011) reveals how analytical CRM supports organizations in understanding which customers generate the most value, which products perform best, and which sales approaches prove most effective. These insights inform resource allocation decisions, targeting strategies, and performance management. The effectiveness of analytical CRM depends fundamentally on the quality and completeness of operational data. When operational processes function smoothly and users consistently work within the CRM system, analytical capabilities receive comprehensive, accurate data for analysis. However, when operational functionality proves inadequate or it takes too much time, users develop workarounds outside the system or don't keep the data up to date. This is also a pattern this thesis examines through the quote generation case study. The result of such patterns is that data quality deteriorates and analytical insights suffer. This interdependency between operational effectiveness and analytical capability represents a key consideration when evaluating functionality gaps as well.

Collaborative CRM facilitates information sharing and coordination across customer-facing functions and communication channels. Modern customers interact with organizations through multiple touchpoints such as phone calls, emails, websites, social media and in-person meetings. Collaborative CRM aims to ensure that customer information and interaction history remain easily visible and accessible regardless of channel or department, enabling consistent service delivery and preventing the fragmented experiences that occur when different parts of an organization lack visibility into customer relationships (Dewnarain et al., 2018). Collaborative functionality provides unified customer overviews that store information from all touchpoints, making complete customer histories visible to any appropriately authorized employee. This visibility supports coordinated support and prevents situations where customers must repeatedly provide the same information to different departments. However, collaborative CRM objectives become undermined when operational functionality gaps force users to work outside the system. If salespeople generate quotes using tools separate from CRM because standard quote functionality proves inadequate, that activity becomes invisible to other departments, fragmenting the unified customer view that collaborative CRM aims to benefit from.

These three CRM dimensions, operational, analytical, and collaborative, function as an integrated system rather than independent capabilities. Operational CRM generates customer data and executes processes. Analytical CRM transforms that data into insights guiding strategic decisions. Collaborative CRM ensures information accessibility across organizational boundaries. Understanding this interdependence is essential for examining functionality gaps later in the thesis.

2.3 CRM Configuration

While CRM platforms are not designed for an individual business that does not mean that they do not provide extensive customization capabilities designed to accommodate these diverse organizational requirements. However, not all modifications to CRM systems require the same level of effort or create the same implementation risks. Understanding the distinction between configuration and custom development proves essential for organizations evaluating how to address functionality gaps and their impact. Van Beijsterveld and Van Groenendaal (2016) describe this with different vocabulary, defining it as resolving system misfits that are either of surface structure or deep structure.

Configuration refers to modifications that can be achieved through built-in administrative tools without the need for programming or custom code development. Modern CRM platforms provide extensive configuration capabilities that enable system administrators to adapt systems to organizational needs. They can add custom fields to capture information specific to their business, create automated workflows that enforce business rules and route records appropriately, design custom reports and dashboards presenting information relevant to specific roles, modify user interfaces to emphasize the most important information for different user types, and establish security permissions controlling data access. These configuration capabilities make CRM platforms flexible enough to accommodate many organizational variations (Suoniemi et al., 2022). Configuration offers several advantages. Changes can typically be made relatively quickly by trained administrators without engaging software developers. Configuration changes work within the platform's supported architecture, meaning they receive ongoing support and updates from the vendor. Testing such configurations is usually not too difficult as the changes cannot fundamentally change the system in a way that is not supported by the vendor. Organizations can often reverse or modify configurations if business requirements change and the risks are low. These characteristics make configuration the preferred approach when standard capabilities can address business requirements.

Custom development however, refers to modifications that go beyond standard configuration capabilities, typically requiring programming, custom code development, or integration with external systems. Organizations pursue custom development when business requirements exceed what configuration can deliver. Examples include developing complex business logic that standard workflow tools cannot accommodate, creating sophisticated document generation capabilities beyond standard templates, integrating with specialized external systems for specific functions, and building entirely new functionality not present in the standard platform, but built on top of it (Brehm et al., 2001). Custom development introduces additional complexity and considerations. Development requires specialized technical skills, often necessitating engagement of developers or implementation partners. Custom code creates ongoing maintenance obligations - when the CRM platform updates, custom code may require modification to maintain compatibility. Testing complexity increases because custom functionality may interact unexpectedly with standard features. Implementation timelines extend as custom development requires analysis, design, development, and testing cycles. Total

cost of ownership increases due to initial development expenses and ongoing maintenance requirements.

The distinction between configuration and custom development matters because it fundamentally affects how organizations address functionality gaps. Some gaps can be bridged through configuration using standard capabilities, other gaps require custom development or external tool integration because standard capabilities fundamentally cannot deliver them. Organizations are faced with a decision about whether to accept these functionality limitations, invest in custom development, modify business processes to fit standard capabilities, or adopt hybrid approaches combining CRM with external specialized tools alongside their associated cost.

Schwarz (2024) reports that organizations increasingly adopt hybrid approaches, using a mix of standard CRM capabilities and external specialized tools. This strategy accepts the fact that integrations are complex and that the cost of connecting multiple systems is the price for achieving comprehensive functionality that fully supports business requirements. The case study examined in Chapter 5 contains this hybrid approach, where the organization combined Dynamics 365 configuration with an external document generation tool to address quote functionality gaps that standard capabilities could not adequately fulfil.

2.4 CRM Implementation Strategies

The approach an organization selects for CRM implementation significantly influences the types and severity of functionality gaps that emerge. Implementation literature identifies two primary patterns: big bang and phased approaches (Holland & Light, 1999; Markus & Tanis, 2000).

Big bang implementations deploy complete CRM functionality across the entire organization simultaneously, replacing legacy systems in a single transition. This approach eliminates the complexity of maintaining parallel systems, creates immediate organization-wide standardization, and offers clear project milestones for planning and evaluation. However, big bang approaches carry substantial risks regarding functionality gap emergence. When organizations deploy comprehensive solutions without adequate testing of complex business scenarios, they often discover critical gaps only after go-live (Kimberling, 2021). At this point, users across the entire organization simultaneously encounter problems, creating pressure for rapid fixes during normal business operations. Research on ERP implementations demonstrates that big bang approaches experience higher failure rates because they provide limited opportunities to learn and adjust before full deployment (Tsai et al., 2011).

Phased implementations roll out CRM functionality incrementally, either deploying to organizational units sequentially or implementing functional modules progressively (Markus & Tanis, 2000). Early phases serve as learning opportunities, allowing organizations to identify and address functionality gaps before they affect the entire organization (Ross & Vitale, 2000).

When gaps emerge during initial deployment, they impact a limited user population while others continue with familiar systems, providing time for thoughtful gap resolution rather than crisis management. However, phased implementations create technical complexity through integration requirements between new and legacy systems, potential data consistency problems, and extended timelines that can create change fatigue (Somers & Nelson, 2004).

Regardless of strategy chosen, implementation success depends on systematic gap analysis and requirements definition. Big bang implementations require rigorous preparation because there is no opportunity to adjust once systems go live. Phased implementations provide flexibility only if organizations use early phases as genuine learning opportunities. The case study in Chapter 5 demonstrates how functionality gaps that emerged gradually over several years of phased expansion ultimately required systematic resolution through the frameworks examined in Chapter 3.

3 ADDRESSING CRM FUNCTIONALITY GAPS

A functionality gap, or what Van Beijsterveld and Van Groenendaal (2016) call - a "system misfit", is the disconnect between what a CRM system provides as standard capability and what an organization actually needs to support its business processes. These gaps manifest when standard features prove insufficient, whether due to missing capabilities, inadequate performance, poor usability, or integration limitations with other systems. Zablah et al. (2004) describe this phenomenon as a "process-technology gap": the misalignment between how business processes should work and what the technology actually supports. Gap resolution refers to the systematic process of identifying these disconnects, evaluating solution alternatives, and implementing changes that align system capability with business requirements.

Organizations addressing CRM functionality gaps face both technical and organizational challenges. Research consistently shows that 70-80% of CRM implementations fail due to process-related issues rather than technology limitations (Tazkarji & Stafford, 2020). This chapter examines frameworks for identifying, analyzing, and resolving these gaps: business process improvement principles, systematic gap analysis, change management approaches, and the importance of quote generation in B2B contexts.

3.1 Business Process Improvement

Business process improvement (BPI) offers a systematic approach for organizations seeking to enhance their operational efficiency and effectiveness. Harrington (1991), whose foundational work introduced BPI to modern business practice, defines it as a methodology to analyze existing processes and implement changes that improve quality, reduce costs, and increase speed. Organizations use BPI to identify where current operations fall short of requirements and develop structured solutions to address these gaps.

The relevance of BPI to CRM functionality gaps becomes clear when examining why CRM implementations struggle. Anand et al. (2013) analyzed 116 peer-reviewed articles and found that business process management and business process improvement emerged as primary strategies for organizations managing IT implementations successfully. This finding suggests that treating CRM functionality gaps as process improvement challenges rather than purely technical problems leads to better outcomes.

The parallel between BPI and CRM implementation challenges runs deeper than strategic alignment. Adesola and Baines (2005) emphasize that effective BPI requires "holistic, structured and procedural" methodologies that provide practitioners with step-by-step guidance for making informed changes to business processes. They identify 6 stages:

1. Identify the process needing change
2. Analyze current state and pain points
3. Conduct root cause analysis
4. Design and evaluate solutions
5. Implement the improvement
6. Monitor and evaluate results

CRM functionality gaps demand this same systematic approach. When organizations discover their CRM cannot adequately support quote generation for example, they face process improvement challenges that require structured analysis and methodical solution development.

Research consistently shows that most BPI and CRM initiatives fail for similar reasons. Ibrahim et al. (2019) found that BPI projects often fail due to lack of commitment, communication, and inadequate resources these are organizational challenges rather than technical challenges. Recent systematic reviews of CRM implementations in SMEs confirm this pattern, with organizational factors like process alignment, stakeholder engagement, and change management determining success more than technical capabilities (Guerola-Navarro et al., 2024). The failures originate from how organizations approach improvement rather than from technology limitations.

Vanwersch et al. (2016) identified a critical limitation in many improvement initiatives: organizations fail to explore the full range of redesign possibilities, leaving improvement potential unrealized. This limitation manifests directly in CRM contexts. Organizations may accept that their CRM system cannot generate multilingual quotes or properly handle complex pricing structures without systematically examining whether alternative configurations, customizations, or integrations could address these needs. The systematic exploration that BPI demands helps organizations avoid prematurely accepting system constraints and discarding improvement possibilities.

Understanding business needs before attempting improvements stands as a core BPI principle. Adesola and Baines (2005) stress that methodologies must help practitioners make "informed, consistent and efficient changes" through systematic assessment. For CRM functionality gaps,

this means organizations must thoroughly understand both what the system currently cannot do and what the business actually requires before jumping to solutions. A sales team complaining about "slow quote generation" might face problems ranging from inadequate document templates to missing product data integrations to inefficient approval workflows. Systematic assessment reveals root causes rather than surface symptoms.

BPI provides the analytical lens for the gap analysis framework presented in Section 3.2 because it emphasizes structured progression from problem identification through solution implementation. This structured approach addresses the reality that CRM functionality gaps rarely exist in isolation, they typically interconnect across functionality, usability, performance, and integration dimensions. The systematic methodology that defines effective BPI helps organizations address these interconnected challenges comprehensively rather than applying piecemeal fixes that leave underlying problems unresolved.

3.2 Gap Analysis and Resolution

Gap analysis serves as the diagnostic component of business process improvement, it provides the structured method for identifying where current processes fall short before attempting solutions. Without systematic gap analysis, organizations risk implementing changes that address symptoms rather than root causes, or investing in solutions for problems that were never properly understood. The gap analysis process follows the same logic as BPI: assess the current situation, identify specific deficiencies, define what improvements must accomplish, and develop solutions. Table 1 outlines the key stages of the gap analysis process.

Table 1: Gap Analysis Stages

Stage	Primary Objective	Key Outputs & Activities
1. Current State Assessment	To diagnose how systems and processes currently function.	Process maps, pain point inventories, and performance baselines.
2. Gap Identification	To articulate and categorize specific unmet needs.	Classification of gaps (Functionality, Performance, Usability, or Integration).
3. Requirements Definition	To translate identified gaps into actionable technical needs.	Functional (what) and non-functional (how) requirement specifications.

Source: Own work.

Current state assessment examines how processes and systems actually work today, analyzing current functionality, understanding where processes break down, documenting user

experiences, and noting workarounds people have created despite system limitations. Siha and Saad (2008) found that effective assessment acts as a diagnostic tool, uncovering root causes rather than surface symptoms. Sales teams might complain that quote generation takes too long, but systematic assessment often reveals deeper problems like inadequate template management combined with complex international pricing rules. Multiple perspectives matter: end users understand operational challenges, managers know strategic requirements, and technical staff grasp system capabilities and constraints. The assessment produces tangible outputs: process maps showing workflow and inefficiencies, pain point inventories cataloging specific problems, and performance baselines measuring current efficiency, quality, or satisfaction levels.

Gap identification builds on current state assessment by articulating exactly what the system fails to support, producing specific descriptions of unmet needs rather than vague complaints about "poor performance." CRM systems typically exhibit four gap types. Functionality gaps occur when required capabilities don't exist or only work for basic scenarios. Performance gaps arise when features run too slowly or create inefficient workflows. Usability gaps exist when functionality technically works but users find it too difficult to access. Integration gaps prevent proper connection with other organizational systems. Zablah et al. (2004) identified three specific gap types creating cognitive dissonance for CRM users: process-technology gaps (misalignment between how processes should work and what technology supports), technology-employee gaps (insufficient user knowledge to use capabilities effectively), and employee-process gaps (users don't understand how processes should function within the system). Prioritizing gaps requires weighing business impact, user impact, feasibility, and strategic alignment. Organizations typically prioritize high-impact gaps affecting many users when feasible solutions exist.

Requirements definition translates identified gaps into specific descriptions of what solutions must accomplish. The International Institute of Business Analysis (2015) distinguishes functional requirements (what the system must do) from non-functional requirements (how well it must perform). For CRM gaps, functional requirements might specify generating multilingual quotes or automatically applying customer-specific discounts; non-functional requirements might specify completion timeframes or availability standards. Stakeholder involvement ensures solutions address actual needs rather than assumptions. Well-defined requirements are unambiguous, verifiable, traceable, and feasible. Prioritization distinguishes must-have capabilities from nice-to-have enhancements.

Gap resolution, on the other hand, can be achieved through different Solution development strategies, which translate requirements into concrete approaches. Organizations typically face multiple solution paths, each with distinct advantages, risks, and resource needs. Table 2 summarizes these approaches, ranging from low-risk configuration changes to more complex hybrid solutions that combine technical and organizational interventions, all with their unique limitations, risks and advantages.

Table 2: Functionality Gap Resolution Strategies

Strategy	Description	Advantages	Risks & Limitations
Configuration	Modifying systems using built-in tools (fields, workflows) without custom code.	Speed, vendor support, and reversibility.	May fall short when requirements exceed standard tools.
Custom Development	Extending platform capabilities through programming and custom code.	Enables bespoke capabilities standard platforms cannot provide.	Maintenance obligations and compatibility issues (Brehm et al., 2001).
Integration	Connecting CRM with external specialized systems.	Access to comprehensive, specialized functionality.	Additional architectural complexity.
Hybrid / Organizational	Combining technical solutions with process and behavior changes.	Better alignment between system and users; higher success rates.	Requires coordination and change management (Mishra et al., 2009).

Source: Own work.

Configuration modifies systems using built-in administrative tools without custom programming, adding fields, creating workflows, designing reports. Configuration offers speed, vendor support, and reversibility, but may fall short when requirements exceed what standard tools accommodate.

Custom development extends beyond configuration through programming and custom code. Development enables capabilities standard platforms cannot provide, but introduces complexity, maintenance obligations, and potential compatibility issues when platforms update (Brehm et al., 2001).

Integration connects CRM with external specialized systems providing required capabilities. Integration accepts additional architectural complexity in exchange for accessing comprehensive functionality that pure configuration or customization cannot efficiently deliver.

Contemporary research shows organizations increasingly adopt hybrid approaches combining multiple solution categories (Guerola-Navarro et al., 2024). Solution evaluation requires systematic comparison across capability criteria (addressing requirements), cost criteria (total expenses including maintenance), complexity criteria (implementation difficulty), and risk criteria (deployment success, reliability, adoption likelihood).

Mishra et al. (2009) emphasizes that CRM implementations increasingly require hybrid approaches combining technical and organizational solutions. Technical solutions modify systems; organizational solutions modify processes, procedures, or behaviors to align better with system capabilities. Successful gap resolution often requires both elements working together.

3.3 Change Management in CRM Optimization

Successful gap resolution depends equally on managing the human aspects of change. Technological implementations fail not only due to technical inadequacies, but because organizations struggle to manage people through change (Rababah et al., 2011b). Contemporary research shows that 60-70% of change initiatives fail (Errida & Lotfi, 2021), with resistance, rooted in uncertainty and fear of increased workload, as a fundamental barrier (Warrick, 2022).

Different stakeholder groups hold distinct perspectives: end users understand operational challenges, management provides strategic direction, IT personnel grasp technical constraints. Each group evaluates changes through different lenses, salespeople care whether new processes accelerate their ability to close deals, managers focus on visibility and control, IT considers maintainability. Joshi (1991) demonstrated through the Equity Implementation Model that users evaluate changes based on perceived equity, whether they gain or lose. When users participate in designing solutions, they perceive equity gains because their inputs increase while outcomes improve. Kim and Kankanhalli (2009) found that user resistance represents a salient reason for information systems failure. Organizations designing solutions without user involvement often discover during rollout that solutions fail to address actual workflow challenges. Effective engagement ensures solutions address actual requirements, builds ownership (Suoniemi et al., 2022), and educates stakeholders about why changes are necessary. Mechanisms include cross-functional project teams, workshops for requirements definition, and iterative feedback through prototyping (Bødker & Grønbaek, 1991) and pilot deployments (Hertzum et al., 2012).

The ADKAR model (Awareness, Desire, Knowledge, Ability, Reinforcement) addresses individual-level change through five sequential stages (Hiatt, 2006). The sequential nature matters: individuals cannot progress to later stages without completing earlier ones. Awareness means individuals understand why change is occurring, for CRM gap resolution, this involves connecting initiatives to problems users experience directly. Desire represents personal decision to support change; understanding need doesn't automatically create willingness, and desire emerges from answering "What's in it for me?" Knowledge means understanding how to change, training on new features, guidance on modified processes. Organizations often overemphasize this stage, assuming training alone produces adoption, but without awareness and desire, even extensive training fails. Ability means capacity to actually implement new skills, requiring practice, coaching, and time. Reinforcement sustains changes through recognizing progress, addressing problems, and resisting regression.

User resistance stems from switching costs, the effort, time, and resources required to change from current to new systems (Kim & Kankanhalli, 2009). These costs create status quo bias, where users prefer maintaining current situations even when new systems offer benefits. For CRM functionality gap resolution, resistance often emerges because users have developed comfortable workarounds. When organizations implement improved quote generation, salespeople accustomed to creating quotes in Word may resist adopting new CRM-based processes even when those processes offer advantages. Lapointe and Rivard (2005) found that resistance results from perceived threats throughout implementation, manifesting from passive behaviors like ignoring new processes to active behaviors like openly refusing to use new systems. Changes perceived as equitable, where benefits outweigh costs, face less resistance (Joshi, 1991).

Organizational readiness addresses whether organizations possess necessary conditions for successful implementation. Shokohyar et al. (2016) identified four readiness dimensions: organizational factors (top management support), technological factors (IT infrastructure), human factors (user competence), and environmental factors (competitive pressure). These dimensions interact to determine implementation success probability. Assessing readiness across all dimensions identifies preparation needs before implementation begins. Alshawhi et al. (2011) demonstrate that organizations with higher technological infrastructure and digital literacy experience greater CRM benefits, suggesting organizations with limited technology sophistication require more extensive preparation.

Having established frameworks for gap analysis and change management, the following section examines quote generation as a specific example of CRM functionality gaps that organizations commonly encounter in B2B contexts.

3.4 Quote Generation as a Critical CRM Gap

The process of quote generation represents a critical step in B2B sales where organizational capabilities, technological functionality, and customer expectations converge. Standard CRM quote functionality aims to streamline the process of creating customer proposals, typically including product catalogs, price lists, line item creation, basic discount rules, document templates, and electronic delivery mechanisms (Wong, 2020). For organizations with simple products, domestic operations, standard pricing, and uncomplicated approval processes, these standard capabilities address the fundamental requirements for quote generation effectively. In such straightforward business scenarios, a company selling a limited number of products at fixed prices to customers in a single market can successfully utilize standard CRM quote modules with minimal configuration, allowing the customer to make an informed purchase decision.

However, many B2B organizations operate in more complex environments where standard quote functionality proves insufficient. As Pandey et al. (2025) describe, multinational organizations face the challenge of applying global strategic approaches while adapting to local

business cultures, languages, and regulatory frameworks. International business requirements, such as multi-currency management for volatile markets and multi-language templates, often exceed basic CRM capabilities. Regional variations further complicate the process; for example, certain European markets expect specific payment term discounts, while others require entirely different information hierarchies and visual presentations. Furthermore, the legal dimension adds a layer of risk, as quotes often serve as pre-contractual documents that can become legally binding upon acceptance (Bridge, 2017). Because different jurisdictions have varying requirements for what constitutes a valid commercial offer, organizations require templates that can adapt to local legal frameworks while maintaining corporate standards, a level of flexibility rarely supported by standard CRM modules.

This complexity extends to pricing logic and template management, where limitations often create a significant administrative burden. Organizations may require volume discounts, partner-specific pricing, or promotional campaigns that force them to calculate discounts manually or develop custom logic (Pricefx, 2023). Template management illustrates a particularly common limitation, as CRM platforms typically use static templates that lack the ability to easily access product-level detail information stored deep within the table hierarchy (Kanellou & Spathis, 2013). This technical limitation forces organizations to either manually add product specifications or accept incomplete quotes that lack information customers need for decision-making. These challenges are representative of the profile of the case study organization examined in Chapter 5, which operates with international diverse product portfolios and dynamic pricing needs (Rangarajan et al., 2021).

When standard technology fails to support these sophisticated requirements, it creates a critical functionality gap that impacts the strategic role of the quote. Quotes serve multiple functions beyond simple price communication: they act as formal business proposals, establish contractual frameworks, and project organizational professionalism (Johnston & Marshall, 2016). Moncrief and Marshall (2005) identify quote preparation as one of seven critical steps in the evolved selling process, noting that effective delivery can differentiate organizations in competitive markets. Furthermore, value-based selling requires quotes to communicate comprehensive value propositions, a complexity that standard CRM functionality often cannot accommodate (Töytäri & Rajala, 2015). The decision-making psychology literature suggests that how this information is presented significantly influences purchasing decisions (Kahneman & Tversky, 1979); therefore, when CRM systems cannot support visual design, information architecture, and personalization, the resulting functionality gap directly affects revenue generation.

This friction exemplifies the technology-process gap that Zablah et al. (2004) describe in their CRM implementation framework. Organizations develop sophisticated quoting processes to meet market requirements, but standard technology fails to support them, leading to manual workarounds, degraded data integrity, and diminished CRM benefits. As Hunter and Perreault (2007) suggest, when technology fails to support critical sales tasks, productivity suffers as salespeople spend excessive time on administrative tasks rather than customer engagement.

Addressing these gaps typically requires hybrid solutions combining CRM configuration, external tool integration, and process reengineering. Examining these quote generation challenges provides the essential theoretical foundation for the case study presented later in Chapter 5, illustrating how functionality gaps persist despite decades of CRM development and how organizations can successfully bridge the gap between standard capabilities and complex business requirements.

4 METHODOLOGY

This chapter outlines the research approach used to examine how organizations successfully bridge the gap between standard CRM functionality and complex business process requirements. The methodology combines theoretical analysis with empirical investigation, focusing on understanding functionality gap resolution strategies through employee perspectives and organizational experiences.

This study employs a qualitative research design combining literature review with semi-structured interviews to examine CRM functionality gap resolution. The qualitative approach was selected because it enables deep exploration of complex organizational topics that cannot be adequately captured through quantitative metrics alone (Yin, 2018). As Myers (2013) notes, qualitative research is particularly suited for understanding how and why organizations implement information systems in specific ways, making it appropriate for examining functionality gap resolution strategies. The research recognizes that understanding CRM functionality gaps requires examining both the technical capabilities of systems and how users interpret and experience those capabilities (Walsham, 1995). Functionality gaps are not merely technical problems but emerge from the interaction between organizational needs, system capabilities, and user expectations.

The primary data collection method consisted of semi-structured interviews with experienced CRM professionals. Semi-structured interviews were chosen because they provide flexibility to explore emerging themes while maintaining sufficient structure for comparison across participants (Robson & McCartan, 2016). This method allowed deeper probing into specific functionality gap challenges while adapting questions to each participant's area of expertise.

The interview approach was accompanied by a review of standard CRM implementation methodologies and vendor best practice guides (e.g., Microsoft Dynamics 365 standard protocols). While direct access to internal project documentation was restricted due to confidentiality, these external industry standards served as a benchmark for evaluating the case study's specific challenges. Consequently, the primary validity strategy relied on investigator triangulation: cross-referencing insights from four distinct stakeholder perspectives (Strategic, Technical, Support, and Operational) to ensure a comprehensive view of the functionality gaps.

Participants were selected using purposive sampling to ensure representation of key stakeholder perspectives in CRM functionality gap resolution. Selection criteria included direct experience

with CRM implementation projects involving functionality gaps, minimum three years of experience in CRM consulting or management, involvement in quote process optimization or similar functionality enhancement projects, and representation of both implementation partner and client perspectives. This approach follows Patton's (2015) recommendation to select participants who have valuable, detailed knowledge about the research topic.

Table 3 presents the interview participants and their relevant characteristics:

Table 3: List of interviewees

Interviewee	Role	Organization Type	Years of CRM Experience	Primary Expertise
Consultant 1 (CONS 1)	Business Landing Manager	Implementation Partner	5+ years	CRM implementation
Manager 1 (MAN)	Regional Director of CRM	Implementation Partner	10+ years	Strategic CRM adoption
Consultant 2 (CONS 2)	CRM Support Team Lead	Implementation Partner	5+ years	System optimization
Business Representative (BR)	Product Owner	Selected Company	5+ years	Sales processes, quote generation

Source: Own work.

The combination of business and consultant perspectives provides both insider and outsider views of functionality gap challenges, enhancing the comprehensiveness of findings (Eisenhardt & Graebner, 2007).

Interviews were conducted between January 2022 and May 2023 following a semi-structured protocol developed from the literature review. The interview guide included core questions about identification and assessment of CRM functionality gaps, strategies for addressing gaps between standard capabilities and business requirements, critical success factors for gap resolution initiatives, change management approaches for functionality enhancements, and specific experiences with quote process optimization. Questions were adapted based on participant roles, for the business representative, questions focused on specific functionality gaps and business impact, while for implementation consultants, questions emphasized best practices, common challenges, and resolution strategies across multiple client contexts.

Each interview lasted between 30-45 minutes and was conducted either in person or via video conference. Detailed notes were taken during interviews, with key quotes and insights recorded verbatim where possible. Following Kvale and Brinkmann's (2015) guidelines, participants were allowed to elaborate on topics they deemed important while ensuring coverage of core research themes.

Data analysis followed thematic analysis procedures outlined by Braun and Clarke (2006). The process involved familiarization through reading interview notes multiple times to identify initial patterns, followed by initial coding to generate codes for significant statements related to functionality gaps. Codes were then grouped into potential themes related to gap identification, resolution strategies, and success factors. These themes were reviewed against the data set and research questions, refined and named to capture their essence, and finally synthesized with literature to develop comprehensive findings presented in Table 6.

Analysis particularly focused on identifying patterns across different stakeholder perspectives and extracting actionable insights for functionality gap resolution. Special attention was given to divergent views between business users and consultants, as these differences illuminate important considerations for successful gap resolution.

5 IMPROVEMENT OF THE QUOTING PROCESS IN A SELECTED COMPANY

This chapter presents an empirical analysis of how a company successfully bridged the gap between standard CRM functionality and complex business process requirements through comprehensive quote process optimization. The analysis relies on the theoretical frameworks established in previous chapters, particularly the concepts of functionality gaps, business process improvement and change management in technology adoption. By examining the specific challenges, solutions, and outcomes of this optimization initiative, this chapter provides practical insights into the strategies organizations can employ to resolve CRM functionality gaps.

5.1 Organizational Context

The selected company represents a mature CRM implementation case. They have utilized Microsoft Dynamics 365 since 2018. This extended period reflects the ongoing nature of CRM optimization rather than a one-time deployment. Through these years, different vendors served as implementation and support partners, resulting in a layered system architecture where foundational processes dating from initial implementation coexisted with features added incrementally as organizational needs evolved.

This evolutionary development pattern aligns with research findings that CRM success depends on continuous adaptation to organizational growth and changing market demands. However, as

the case demonstrates, this incremental approach can also create technical debt, which is an accumulated functionality gap that emerges when standard CRM capabilities cannot keep pace with increasingly complex business requirements.

5.2 Functionality Gap Identification

The quote generation process exemplified the broader CRM functionality gap phenomenon examined throughout this thesis. As established in the theoretical framework, quote generation serves multiple strategic functions in B2B contexts: formal business proposals, contractual frameworks, and projections of organizational professionalism. The selected company's challenges manifested across all these dimensions, creating process-technology gaps that generated cognitive dissonance among end users.

The business representative revealed that standard Microsoft Dynamics 365 quote functionality proves adequate for organizations with simple products and straightforward sales processes. However, as he emphasized, most businesses operate with greater complexity. The selected company's requirements exceeded standard capabilities in multiple critical dimensions. The organization maintained over 3000 active products across multiple categories, including time-based offerings such as licenses, software maintenance agreements, and training services. Standard Dynamics 365 search and filtering capabilities could not efficiently support salesperson navigation of this product portfolio, creating a usability gap that reduced operational efficiency. The challenge extended beyond simple product selection to encompass the complexity of configuring appropriate product combinations and pricing structures for diverse customer requirements.

Operating across multiple countries introduced additional complexity in pricing structures, discount conventions, payment terms, and legal requirements. As examined in the theoretical framework on quote complexity, international contexts require quotes to accommodate multiple currencies, languages, regulatory requirements, and business customs. The selected company required different quote presentations for different markets. For instance, certain European markets expected payment term discounts clearly stated, while other regions followed different business customs. This international dimension created a critical functionality gap where standard CRM capabilities could not adequately support market-specific requirements without extensive customization.

To address language, business unit, and document type variations, the organization had developed many different Word templates. This created a maintenance burden that degraded user experience and reduced system adoption, especially when the template selection interface is not optimized for so many templates. The business representative noted that scrolling through extensive template lists and manually editing documents undermined the expected added value of CRM. Each template required individual maintenance when pricing structures changed, terms and conditions were updated, or branding elements evolved, creating significant administrative overhead. The maintenance challenge was compounded by knowledge

continuity issues. Template modifications required specific technical expertise in Word document formatting and Dynamics 365 integration. As team members with this specialized knowledge left the project and new personnel joined, institutional knowledge gradually eroded. Implementation partner changes further disrupted continuity, as entirely different vendor teams had to familiarize themselves with the existing template architecture and modification procedures. This knowledge transfer problem meant that even routine template updates became increasingly time-consuming and error-prone, as new team members lacked the contextual understanding that original developers possessed.

Word template functionality in Dynamics 365 restricts data integration to entities one level above the quote record. This technical limitation prevented incorporating information that was solely present on the product itself which happens to reside two levels higher in the system hierarchy, forcing users to manually add critical details and creating data consistency challenges. The inability to automatically populate detailed product specifications, compatibility information, and technical requirements meant that quotes often lacked the comprehensive information customers needed for decision-making, or required time-consuming manual data entry that introduced potential errors.

The accumulated functionality gaps created negative impacts on business performance and system adoption, validating theoretical predictions about CRM implementation challenges. The business representative identified several critical consequences that extended beyond operational inefficiency to affect competitive positioning and strategic objectives.

Persistent usability challenges resulted in users abandoning CRM quote functionality in favor of alternative tools, creating fragmented workflows that bypassed standardization objectives. When salespeople develop workarounds outside the CRM system, organizations lose the visibility, data integrity, and process control that motivated CRM adoption in the first place. The business reported that this system avoidance behavior had become widespread, representing a fundamental failure of the CRM implementation to deliver intended value. The inability to efficiently generate professional, customized quotes positioned the organization at a competitive disadvantage. Failing to meet market demands for quote quality and responsiveness could result in lost business opportunities. Additionally, there were specific instances reported where delayed quote delivery or unprofessional presentation had negatively impacted customer perceptions and potentially influenced purchasing decisions in the future.

Manual workarounds required to compensate for system limitations increased time investment per quote while introducing data consistency risks. Though specific time measurements were not systematically tracked before the improvement project, the business representative indicated that quote preparation consumed excessive salesperson time that could have been directed toward customer engagement activities. The inefficiency originated not just from template selection and manual editing, but from the iterative process of identifying appropriate products, calculating discounts, verifying pricing accuracy, and ensuring all required information appeared correctly in final documents. These manual processes also introduced

quality control challenges, as each quote represented an opportunity for human error in pricing, product selection, or terms and conditions.

Table 4 summarizes the identified gaps according to the categorization framework established in Chapter 3, revealing multiple interconnected gap types.

Table 4: Summary of Identified Functionality Gaps

Gap Type	Specific Problem	Business Impact
Functionality	Word templates cannot access product-level data (entity hierarchy limitation); static templates cannot support dynamic document generation	Incomplete quotes; template proliferation (50+ templates); manual data entry required
Performance	Slow search across 3000+ products; cumbersome template navigation; delayed document generation	User frustration; excessive quote preparation time
Usability	Cognitive burden of selecting correct template; manual editing requirements; complex template selection interface	System avoidance; workarounds outside CRM
Integration	Product specifications cannot automatically populate; no seamless data flow between entities	Data consistency risks; incomplete customer information; manual transcription errors

Source: Own work.

The accumulated impact of these functionality gaps created a critical business challenge requiring comprehensive resolution. The organization faced a choice between accepting ongoing operational inefficiency and competitive disadvantage, or investing in process optimization to bridge the gap between standard CRM capabilities and actual business requirements. Management recognized that the existing situation was unsustainable and decided for the improvement initiative examined in this chapter.

5.3 Solution Development and Implementation

Applying the gap analysis framework established earlier in this thesis, the organization conducted systematic assessment of existing quote process capabilities and requirements. This assessment revealed multiple gap categories requiring resolution, each representing a different dimension of the disconnect between system capabilities and business needs.

Standard quote generation features could not support the dynamic document creation requirements, forcing reliance on extensive template libraries that proved unmanageable. This represented a fundamental functionality gap where the architectural approach embedded in standard Dynamics 365 (static templates populated with CRM data) could not accommodate the organization's requirement for dynamic document generation based on multiple configurable parameters. The assessment revealed that no number of templates could adequately address the combinatorial complexity of business unit, language, document type, and regional requirement variations while still keeping it easy to use.

Even where technical capabilities existed, system performance did not meet user requirements for speed and efficiency, particularly in product selection and template management. This performance gap manifested in several ways: slow search response times when filtering large product catalogs, cumbersome navigation through extensive template lists, and delayed document generation when using complex Word templates. The business representative indicated that these performance issues contributed significantly to user frustration and system avoidance behaviors.

The use of templates and manual editing requirements created user experience challenges that drove system avoidance behaviors. Salespeople expected to configure quote parameters and have the system generate appropriate documents, rather than manually selecting from extensive template libraries and editing outputs. The cognitive burden of remembering which template suited which scenario, combined with manual editing, created what the business representative described as an unacceptable user experience.

Limitations in data integration prevented seamless flow of product information into quote documents, requiring manual data entry. This integration gap created both efficiency problems and data quality risks. When product specifications, compatibility information, or technical details could not automatically populate in quotes, salespeople either omitted this information or manually transcribed it from other sources. Both outcomes proved problematic. Incomplete quotes failed to support customer decision-making, while manual transcription introduced potential errors and consumed valuable time.

Based on current state assessment, the organization defined specific requirements for an improved quote generation solution. These requirements reflected both the identified gaps and the organization's strategic objectives for CRM optimization.

Rather than maintaining numerous static templates, the system should generate quote documents dynamically based on configurable parameters including business unit, language, price table detail level, and terms and conditions. This requirement represented a fundamental shift from the template creation approach that had proven unmanageable to a data driven approach. The organization sought a solution where a single template framework could generate appropriate documents based on parameter selections, eliminating the maintenance burden of

managing dozens of static templates while providing greater flexibility to accommodate market-specific requirements.

The solution must access and integrate product-level information regardless of entity relationship hierarchy limitations in standard Dynamics 365. This requirement addressed the integration gap that forced manual data entry and created data consistency risks. The organization needed comprehensive product information, including detailed specifications, compatibility requirements, images, sketches and technical details, to automatically populate in quote documents, ensuring accuracy while reducing manual effort. Generated quotes must support sophisticated visual design that projects organizational professionalism and meets market expectations, as discussed in the strategic importance of quote presentation. The business representative emphasized that competitors' superior quote presentation had become a competitive concern, motivating requirements for enhanced visual design capabilities.

The system should automatically apply appropriate discounts based on customer relationship type while maintaining management oversight through approval workflows. This requirement addressed both efficiency and control objectives. Automated discount application would ensure pricing consistency and reduce manual calculation effort, while approval workflows would maintain management oversight of pricing decisions. The combination of automation and control represented what the business representative described as essential balance between operational efficiency and strategic governance.

Quote formats and contents must adapt to different regional business customs, legal requirements, and market expectations. This requirement directly addressed the international business complexity that had motivated template proliferation in the existing system. Different markets required different information hierarchies, varying levels of technical detail, distinct terms and conditions, and market-specific discount conventions. The solution needed to accommodate these variations within a unified system rather than through separate templates for each market scenario.

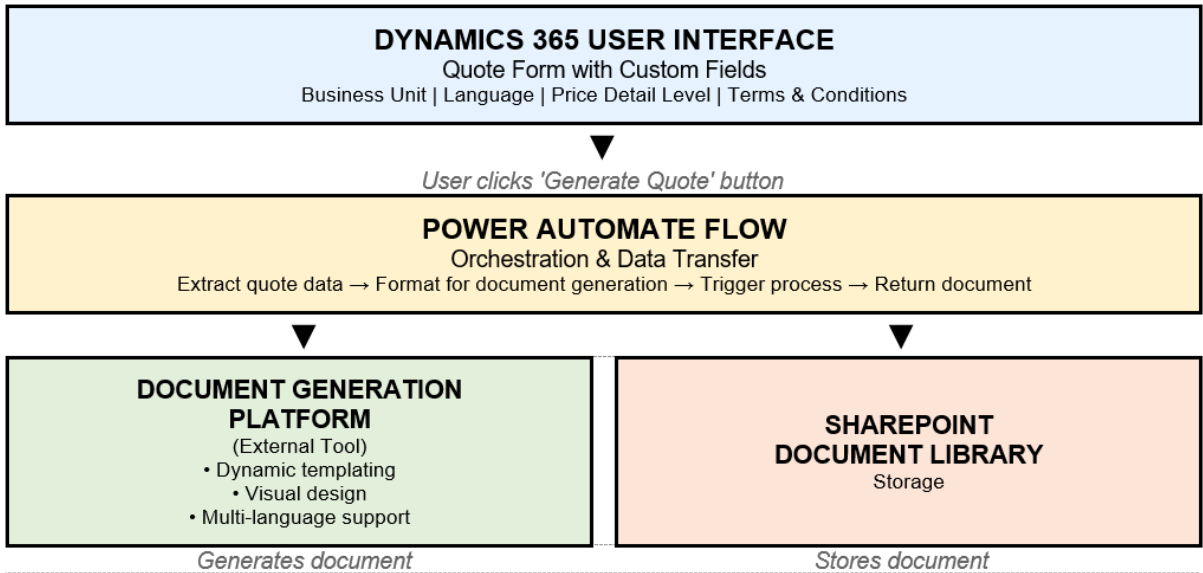
Following gap analysis and requirements definition, the organization determined that standard Dynamics 365 configuration alone could not bridge identified functionality gaps. This finding validates the central thesis that organizations frequently require hybrid approaches combining CRM customization with external tool integration to address complex business requirements. The business representative emphasized that the organization explored various configuration options within standard Dynamics 365 before concluding that external tool integration was necessary.

The selected solution strategy incorporated three interconnected components working together to deliver comprehensive functionality. Custom fields and workflows within Dynamics 365 would manage quote parameters and control document generation triggers. This CRM configuration component ensured that the solution remained integrated with core CRM

processes while providing the parameter management capabilities required for dynamic document generation.

Figure 1 illustrates the solution architecture, showing how the four system components integrate to deliver the hybrid solution.

Figure 1: Solution Architecture for Quote Process Optimization



Key Components:

Dynamics 365	CRM platform with custom fields for quote parameters and generation trigger
Power Automate	Microsoft integration platform orchestrating data flow between systems
Document Gen.	External platform providing dynamic templating beyond standard D365 capabilities
SharePoint	Document storage with version control and customer/internal access

Source: Own work.

A specialized document generation platform would provide dynamic template capabilities and sophisticated visual design functionality beyond standard Word template limitations. This external tool component addressed the fundamental architectural limitations in Dynamics 365 Word template functionality, enabling the dynamic document generation approach the organization required. Selecting an appropriate external tool required careful evaluation of multiple document generation platforms to identify solutions that could integrate effectively with Dynamics 365 while delivering required functionality.

The quote creation workflow would be restructured to leverage new system capabilities while maintaining user familiarity with core CRM processes. This process redesign component recognized that technical solutions alone could not deliver desired outcomes without corresponding workflow optimization. The organization needed to redesign how salespeople

created quotes to take advantage of new capabilities while minimizing disruption to established practices. However, since established practices have already been bypassed by workarounds this was a lesser concern. This hybrid approach aligns with theoretical frameworks suggesting that successful CRM functionality gap resolution requires combining technical solutions with process optimization and organizational change management.

The decision to pursue a hybrid approach rather than attempting pure CRM configuration represented what the business representative described as a pragmatic recognition of system limitations. While pure configuration might have been preferable from a simplicity perspective, the organization determined that achieving required functionality justified the additional complexity of external tool integration. This decision-making process exemplifies the trade-offs organizations face when addressing CRM functionality gaps - balancing desires for system simplicity against requirements for comprehensive functionality.

Consistent with change management principles examined in the theoretical framework, the organization established comprehensive project governance incorporating both implementation partner resources and internal employees who work with quotes daily. This stakeholder engagement strategy addresses critical success factors in technology change initiatives. This collaborative approach proved essential for project success, ensuring that technical solutions addressed actual user requirements while building organizational readiness for process changes and avoiding mistakes made in the past.

Joint participation of implementation partner and internal resources facilitated knowledge transfer, building organizational capability for ongoing system maintenance and optimization. The business representative noted that this collaborative approach developed internal expertise that would prove valuable for future optimization efforts and also an understanding by the internal resources for the work that the implementation partner did. Rather than viewing the implementation partner as external consultants who would deliver a finished solution and depart, the organization treated the project as a knowledge-building opportunity that would enhance internal CRM capabilities. What is worth noting that this approach developed a level of trust which has been lost due to the negative experience of the users with the system in the past.

Active engagement created organizational readiness for technology change, preparing users to accept and adopt new processes. By participating in solution development, users gained understanding of why changes were necessary, how new processes would function, and what benefits would result. This awareness-building process proved essential for overcoming what the business representative identified as natural resistance to change, particularly given previous negative experiences with CRM functionality that had driven system avoidance behaviors.

The technical implementation involved three major configuration areas, each addressing specific aspects of the functionality gaps identified during assessment. New custom fields were

added to the quote entity to capture document generation parameters. The Business Unit field defines regional presentation requirements, enabling the system to generate quotes that reflect local business customs and expectations. The Language field supports multilingual quote generation, allowing salespeople to produce documents in appropriate languages regardless of customer or business unit default settings. The Price Table Detail Level field enables appropriate information density for different quote types. Simple quotes might present summary pricing while detailed proposals include comprehensive breakdowns. The Quote Description field provides personalization capabilities, allowing salespeople to include customized messaging for specific customers or situations. The Terms and Conditions field supports situation-specific contractual terms, accommodating scenarios where standard terms require modification. The user is able to specify, from a selection of contractual terms, which should apply for the quote that is being created. The actual contractual terms are all managed in one place and once changed take effect in all future quotes created.

Custom business rules were implemented to automatically populate discount percentages based on customer relationship type and regional conventions. This automation addressed the requirement for pricing consistency while reducing manual data entry. The system maintains discount defaults while allowing salesperson modification subject to approval requirements. Automated discount logic is a critical control mechanism that ensures pricing consistency while providing flexibility for justified exceptions. The automation depends on customer relationship data already present in CRM, applying predetermined discount percentages for partners, resellers, and standard customers. Regional variations are accommodated through business unit-specific discount tables, ensuring that automated discounts reflect local market conditions and competitive dynamics.

Multi-level approval logic was configured to ensure management oversight of quotes meeting specific criteria, such as total value exceeding defined thresholds or discount modifications from automated defaults. The workflow routes approval requests to appropriate managers based on product categories and organizational structure. This approval configuration addresses what the business representative described as essential management control requirements. High-value quotes receive senior management review, ensuring appropriate oversight of significant business commitments. Discount modifications trigger approvals from responsible managers, preventing unauthorized pricing decisions while maintaining flexibility for justified exceptions. Product category-based routing ensures that technical experts review complex solution quotes, while standard product quotes follow streamlined approval paths.

The integration of an external document generation platform addressed limitations in standard Dynamics 365 Word template functionality. Rather than maintaining numerous static templates, the integrated solution generates documents dynamically through a sophisticated process that the business representative described as transformative for quote workflow efficiency.

The system captures parameter values from custom quote fields when users trigger document generation. This capture process ensures that all relevant configuration settings, business unit, language, price table detail level, quote description, and terms and conditions, flow from CRM to the document generation platform. Users trigger document generation through a custom button added to the CRM quote form, providing intuitive access to the functionality without requiring navigation to external systems.

Microsoft Power Automate orchestrates data transfer between Dynamics 365 and the document generation platform. This orchestration layer handles the technical complexity of extracting data from CRM, formatting it appropriately for the document generation platform, triggering generation processes, and returning completed documents to CRM. The business representative noted that this integration architecture maintains user workflow entirely within the CRM interface, salespeople do not need to interact directly with the document generation platform or manage file transfers between systems.

The document generation platform applies these criteria to build a document that is unique to the selected parameters. This dynamic templating capability represents the core value of the external tool integration, enabling a single template framework to produce varied documents rather than requiring separate static templates for each scenario. Generated documents are automatically stored in SharePoint, creating organized document repositories accessible to both salespeople and customers while maintaining version control and audit trails.

5.4 Outcomes and Benefits

While the organization did not conduct formal time-motion studies, the business representative indicated several qualitative efficiency improvements resulting from the optimization. The streamlined workflow reduced the number of steps required to generate quotes and eliminated much of the manual intervention previously needed. The contrast between the original and improved interfaces illustrates the scope of these changes (see Figure 2 and Figure 3).

As visible in Figure 2, the original quote form required users to select from multiple static templates, each designed for specific scenarios. This approach created significant maintenance burden, as each template required individual updates when pricing structures changed, terms and conditions were updated, or branding elements evolved. The template proliferation also degraded user experience, with salespeople needing to scroll through extensive lists to identify appropriate templates for each quote situation. Furthermore, the cognitive load of remembering which template corresponded to which business unit, language, or document type created friction in the quote creation process, slowing down what should have been a straightforward task. This manual selection process introduced opportunities for errors, as selecting an incorrect template could result in quotes containing inappropriate terms, outdated pricing structures, or inconsistent branding. The lack of clear naming conventions and visual differentiation between similar templates compounded these challenges, particularly for newer salespeople or those handling quotes for unfamiliar markets.

Figure 2: Quote form before optimization, showing reliance on multiple static templates.

Source: Own work.

Figure 3 shows the optimized interface, where dynamic field adjustment eliminates the template selection step entirely. This shift from static templates to dynamic generation significantly reduced administrative overhead for template maintenance and version control. Figure 4 compares the complete process flow before and after optimization, illustrating how automation reduced eight manual steps to three user actions.

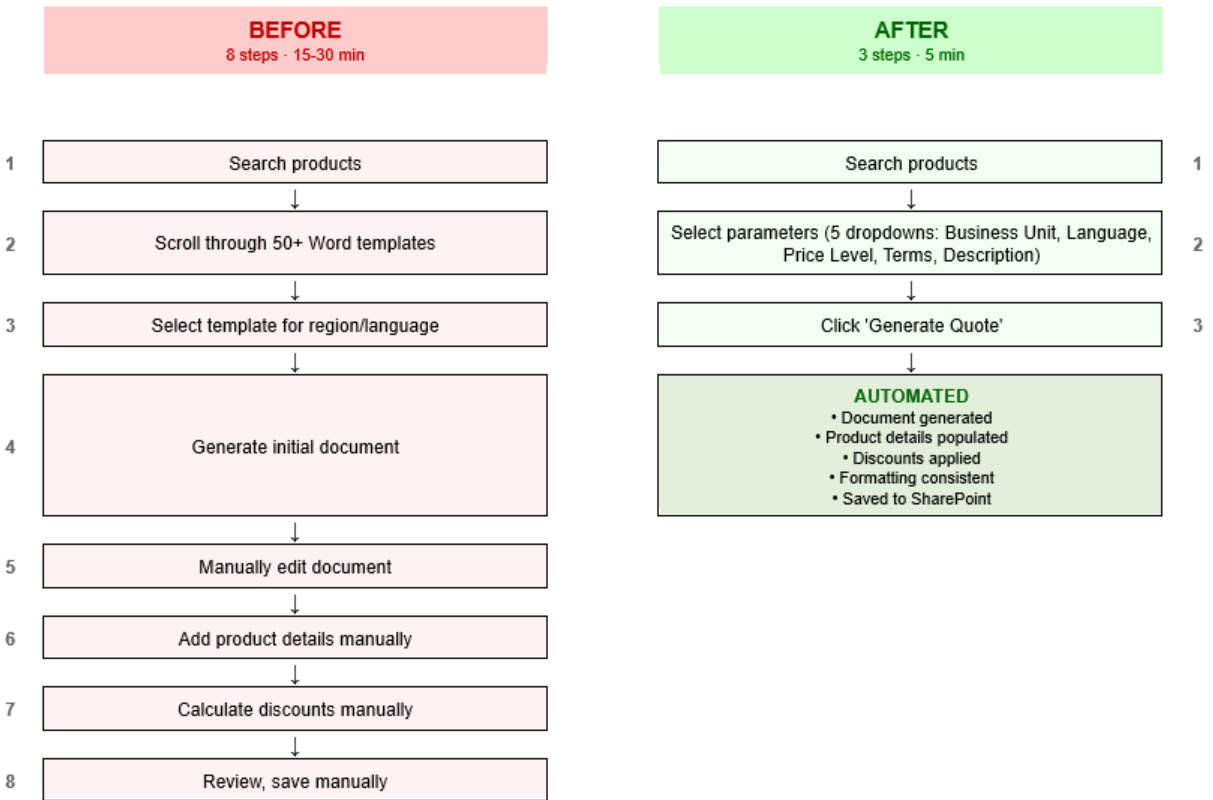
Figure 3: Quote form interface after optimization.

Source: Own work.

Figure 3 shows the optimized interface, where dynamic field adjustment eliminates this template selection step entirely. This shift from static templates to dynamic generation significantly reduced administrative overhead for template maintenance and version control.

The interface improvements shown in Figures 2 and 3 enabled a fundamental simplification of the quote generation workflow. Figure 4 compares the complete process flow before and after optimization, illustrating how automation reduced eight manual steps to three user actions.

Figure 4: Quote Generation Process Flow Comparison



Source: Own work.

Previously, any change to pricing structures, branding elements, or terms and conditions required updating multiple templates individually, creating substantial maintenance burden and risks of version inconsistencies. This resulted in scenarios where different templates fell out of sync, resulting in quotes containing outdated information or inconsistent branding. Dynamic generation from a unified template framework eliminated these challenges, updates to the underlying template immediately apply to all generated documents, regardless of parameter combinations.

Automated discount application and dynamic document generation reduced manual steps in quote preparation, enabling salespeople to redirect time toward customer engagement activities. The business representative indicated that quote preparation time decreased substantially, though precise measurements were not available. More importantly, the cognitive burden of

quote preparation decreased and salespeople no longer needed to remember which template suited which scenario, manually calculate discounts, or carefully review documents for accuracy. This reduction in administrative burden allowed salespeople to focus attention on customer needs and solution configuration rather than document preparation logistics.

The solution delivered improvements in quote quality and professional presentation, addressing competitive concerns that had motivated the optimization initiative. The external document generation platform enabled sophisticated visual presentations that meet market expectations for professional quote documents. Additionally, this was also a more sustainable solution for the future as the business could expand into other markets and have even more variation.

Dynamic template logic supports appropriate presentation variations for different markets, ensuring quotes reflect local business customs and expectations. This capability directly addresses the international business complexity examined in the theoretical framework on quote generation in international contexts. Depending on the country the correct expectation was set in terms of validity dates, payment terms, general format and more. Overcoming standard Word template limitations enabled inclusion of complete product details, images, pricing structures, and terms - enhancing quotes as decision-support tools for customers. Previously, entity relationship hierarchy limitations prevented automatic population of detailed product information, forcing salespeople to choose between incomplete quotes or time-consuming manual data entry. The improved integration ensures that quotes contain comprehensive information customers need for decision-making, including technical specifications, compatibility requirements, pricing breakdowns, and detailed terms and conditions. The business representative emphasized that this completeness enhances quotes' strategic value as sales tools, supporting customer decision-making while reducing subsequent clarification requests.

The implemented approval workflows and automated discount logic enhanced organizational control over the quote process, addressing management concerns about pricing consistency and quote quality. Automated discount application based on relationship type ensures pricing consistency aligned with organizational strategy. This consistency is critical for both financial performance and customer relationship management. Partners receive appropriate discounts automatically, preventing inconsistencies that could damage relationships. Standard customers receive uniform pricing that reflects organizational strategy. The automation eliminates variability that previously resulted from individual salesperson discretion or calculation errors.

Multi-level approval workflows provide appropriate management visibility into high-value quotes or those with modified discount structures, enabling quality control without creating unnecessary approval burdens. The workflow design balances control requirements with operational efficiency. Standard quotes following automated discount logic proceed without approval, maintaining sales process speed. High-value quotes or those with modified discounts trigger reviews by appropriate managers, ensuring oversight where business impact justifies review investment.

The systematic capture of quote parameters, discount modifications, and approval decisions creates comprehensive audit logs supporting process analysis and continuous improvement. These audit logs provide data for analyzing quote patterns, discount effectiveness, win rates by quote type, and other metrics supporting strategic decision-making. The business representative made a point that this analytical capability represents an often-overlooked benefit of systematic CRM processes, the generation of data supporting business intelligence and process optimization.

Perhaps most significantly, the optimization initiative addressed user dissatisfaction that had driven system avoidance behaviors. The improved functionality better met user requirements, encouraging CRM adoption rather than workarounds. This adoption improvement represents the ultimate measure of functionality gap resolution success, creating system capabilities that users willingly embrace rather than avoid.

The business representative stated that user adoption resulted not just from improved functionality but from the participatory approach to solution development. Users who had helped design the improved processes understood the rationale for changes and recognized that their input had shaped final solutions. This sense of ownership contributed to adoption willingness and change acceptance.

Table 5 summarizes these key improvements and their impacts across all four outcome areas identified during the analysis.

Table 5: Summary of the key improvements and their impacts across all four outcome areas.

Improvement Area	Changes and Impact
Process Efficiency	Dynamic template generation eliminated maintenance overhead; automated discount application reduced manual errors; streamlined interface decreased preparation time (see Figure 2 and 3)
Quality & Professionalism	External document generation platform enabled professional visual presentation; dynamic template logic accommodated regional variations; complete product information integration (specifications, images, pricing)
Governance & Control	Automated discount rules ensured consistent pricing; multi-level approval workflows provided management oversight; systematic audit logging enabled process analysis
User Adoption	Functionality aligned with requirements reduced system avoidance; participatory development built user ownership; demonstrated CRM value created momentum for future initiatives

Source: Own work.

The improved user satisfaction also created positive momentum for additional CRM optimization initiatives. Previously, negative experiences with quote functionality had generated skepticism about CRM capabilities generally, creating resistance to other optimization proposals. Successful quote process improvement demonstrated that CRM functionality gaps could be effectively addressed, building organizational confidence in CRM investment and creating receptivity to future enhancements.

Having presented the case study findings, the following chapter discusses their broader implications, examines how they connect to the theoretical frameworks established earlier, and draws practical recommendations for organizations facing similar challenges.

6 DISCUSSION

This chapter synthesizes the research findings, examines their theoretical contributions, provides practical recommendations for organizations, and acknowledges the study's limitations.

6.1 Key Findings

This case directly addresses the central research question: How do organizations successfully bridge the gap between standard CRM functionality and complex business process requirements?

The analysis reveals that successful gap resolution requires systematic identification through comprehensive assessment of functionality, performance, usability, and integration dimensions. What initially appeared as a simple quote generation problem actually encompassed multiple interconnected gaps requiring comprehensive solutions. The case study validated the theoretical frameworks from the literature review: gap analysis methods helped identify root causes, hybrid solution strategies addressed technical limitations, and change management principles enabled user adoption.

When standard platform capabilities prove insufficient, organizations should pragmatically accept hybrid solution strategies combining CRM configuration with external tool integration rather than exhausting resources on impossible pure-configuration approaches. User-centered design proves essential. Engaging end users throughout the optimization initiative ensures that technical solutions address actual workflow needs while building change readiness and solution ownership. This participatory approach transforms potential resistance into advocacy.

The theoretical frameworks established in earlier chapters proved valuable for understanding and interpreting the case study findings. Table 6 synthesizes these connections, mapping each theoretical concept to its empirical manifestation in the case study and the resulting recommendation for practitioners.

Table 6: Mapping of Theoretical Framework to Empirical Findings and Recommendations

Theoretical Concept	Empirical Finding	Recommendation
Process-technology gap (Zablah et al., 2004)	Standard D365 inadequate for product complexity, multi-language, and regional pricing needs	Recognize when standard functionality is insufficient
BPI gap analysis (Adesola & Baines, 2005)	Assessment revealed interconnected gaps across functionality, usability, and performance	Apply structured gap analysis before pursuing solutions
Build vs. integrate (Brehm et al., 2001)	Template proliferation required external tool integration, not just CRM configuration	Balance hybrid solutions across technical and organizational dimensions
ADKAR change management (Hiatt, 2006)	Cross-functional teams with user participation built ownership and reduced resistance	Apply structured change management throughout
User resistance (Kim & Kankanhalli, 2009)	Previous negative CRM experiences drove avoidance; participatory approach transformed resistance	Manage user adoption alongside technical implementation
Continuous optimization (Kumar & Reinartz, 2016)	Gaps emerged years post-implementation as organization expanded internationally	Treat optimization as ongoing capability

Source: Own work.

The project also revealed several challenges consistent with CRM optimization literature. Capturing all quote parameter combinations and regional variations required extensive analysis and iterative refinement. What appeared straightforward during initial requirements gathering revealed unexpected edge cases during detailed analysis. International requirements proved particularly complex, with different markets having subtle variations in expectations that required careful documentation. One of the biggest challenges was translating simple statements like "I want to create quotes quickly" into concrete requirements that could guide solution development.

Even with clear benefits, introducing new processes required substantial user training and adjustment periods. Despite involving users in solution development, actual adoption required overcoming ingrained habits and mental models developed through years of working with the previous system. Some users initially struggled with new workflow concepts, particularly the

parameter-based approach to document generation that replaced familiar template selection. Comprehensive training and ongoing support proved essential for building user confidence with the new processes.

Orchestrating data flow between Dynamics 365, the external document generation platform, and SharePoint required careful technical coordination and testing to ensure reliability. Integration complexity emerged as a significant implementation challenge, requiring multiple iterations to achieve stable operation. Hybrid solutions involving multiple platforms require substantially more technical rigor than pure CRM configuration projects.

Consistent with the thesis that CRM success requires continuous adaptation, quote process optimization remains ongoing rather than complete. Market requirements continue evolving, necessitating periodic adjustments to templates, approval logic, and parameter options. Rather than viewing these ongoing requirements as implementation failures, the organization recognizes them as natural consequences of dynamic business environments. The improved system architecture actually facilitates ongoing optimization by centralizing configuration logic. Changes that previously required updating numerous templates now require single updates to the unified template framework.

6.2 Theoretical Contribution

This case study provides empirical validation of several theoretical frameworks examined in the literature review. The quote generation challenge exemplified multiple interconnected gap categories: functionality gaps where standard capabilities proved inadequate, usability gaps manifested through template proliferation, and performance gaps reflected in efficiency limitations. Complex business requirements create these interconnected patterns, requiring comprehensive solutions rather than isolated technical fixes. Organizations cannot address functionality gaps in isolation; usability and performance considerations interact to determine overall system effectiveness.

The necessity of combining CRM configuration with external tool integration validates theoretical predictions that standard system capabilities alone frequently cannot resolve functionality gaps (Schwarz, 2024). This has important implications for CRM optimization initiatives. Organizations should realistically assess when external tool integration becomes necessary rather than assuming standard platform capabilities can accommodate any requirement through sufficient configuration. While hybrid approaches add integration complexity, they can deliver functionality improvements that pure configuration cannot achieve. This validates the proposition that successful functionality gap resolution often requires solutions extending beyond standard platform boundaries.

The importance of stakeholder engagement and user involvement confirms change management frameworks (Hiatt, 2006; Goyal & Patwardhan, 2018) emphasizing that technical solutions require organizational change management for successful adoption. Technically

sophisticated solutions fail without corresponding attention to user requirements, change readiness, and adoption support. Organizations cannot treat CRM optimization as purely technical projects. They must integrate change management principles from project inception through post-implementation support. The participatory approach employed here, involving users in requirements definition, solution design, and testing, proved essential for building change readiness and ensuring adoption.

The ongoing nature of quote process refinement supports theoretical perspectives positioning CRM success as continuous adaptation rather than one-time implementation (Suoniemi et al., 2022). This challenges common organizational assumptions that CRM projects have defined endpoints where systems become "complete." Effective CRM utilization requires ongoing optimization capability as business requirements evolve. Organizations should build internal capabilities for continuous CRM refinement rather than viewing optimization as discrete projects requiring external consultant engagement. This positions CRM competency as an organizational capability requiring sustained attention and resource investment.

6.3 Practical Recommendations

Based on the theoretical framework, case study analysis, and practitioner interviews, this section provides practical recommendations for organizations implementing CRM systems or addressing functionality gaps in existing implementations. While each organization faces unique challenges, these recommendations identify common success factors and critical considerations that can guide implementation decisions.

6.3.1 Preparing for CRM Implementation

Organizations must recognize that CRM implementation extends beyond technical deployment. As one consultant (CONS 1) emphasized, "This is not a technical implementation, or at least not just a technical implementation. It is a commitment to business processes which are dynamic and always changing." This perspective aligns with research showing that CRM success depends more on organizational readiness and process alignment than technical capabilities alone (Almotairi, 2009).

Ideally, businesses should have clear understanding and documentation of their processes. This documentation serves multiple purposes: ensuring internal alignment, providing implementation partners with necessary context, and establishing baselines for measuring improvement. Without documented processes, implementations lack the foundation needed for effective configuration decisions. Organizations should distinguish between processes as rules versus guidelines. If processes are merely guidelines without enforcement discipline, CRM implementations face fundamental challenges.

Companies need to diagnose their processes and identify improvement opportunities before implementing CRM. If processes are unclear or their impacts unknown, organizations should seek business consulting or clarify processes internally first. CRM systems support and enhance processes; they do not create or fix broken processes. Clear processes and strategy must exist first, with CRM serving as one tool for achieving defined goals.

According to the Regional Director (MAN), successful projects typically feature deep management inclusion in implementation processes. CRM implementation is fundamentally change management, and without management support, convincing people to change daily processes proves extremely difficult. Management needs to understand why change is occurring, what benefits it provides, and what return on investment it delivers. As a practical guideline, management should participate in steering and coordination meetings at least monthly.

Organizations should understand their existing IT landscape before making CRM decisions. Companies already using extensive Microsoft solutions might benefit from staying within that ecosystem, as integration complexity decreases and enterprise agreements can reduce costs. However, ecosystem alignment should not override functional requirements. The case study demonstrated that even within a Microsoft-committed environment, the organization required external tool integration to address quote generation gaps.

Organizations should not underestimate data hygiene importance. Regardless of the solution chosen, poor data quality prevents benefit realization. Organizations should clean data before migrating to new systems, establishing clear rules for how customer records should be structured.

CONS 1 emphasizes that companies should clearly understand their objectives before implementing CRM. Too often, organizations believe they need CRM without clear reasoning. Only after understanding why they need CRM and what they aim to achieve should they contact implementation partners. A good practice involves designating a responsible person to coordinate and connect stakeholders. This individual can come from business or IT backgrounds, provided they possess necessary competency. Critically, they need management trust and confidence to perform effectively in this role.

The biggest implementation challenge involves communicating expectations so implementation partners fully understand requirements. Getting both parties to share understanding proves much harder than expected. Organizations and vendors should invest substantial time discussing expectations in detail and visualizing processes to identify misunderstandings beforehand.

Organizations should ensure they have representation covering the entire company, not just individual departments. Too many decision-makers can cause unnecessary complications and internal tension. Therefore, one person with good company understanding should preferably be made responsible for aligning internal resources toward identified implementation goals.

CONS 1 warns that companies should expect to make compromises. Business solutions are built around standard, expected processes. Following best practices reduces adjustment needs and support costs compared to implementing completely unique processes with many custom features. Organizations need to identify which processes could be optimized and which provide market added value. Processes bringing added value should never be compromised. Here, companies and vendors must implement them without deviations. The case study exemplified this principle: quote generation represented a differentiating capability requiring customization beyond standard functionality.

The customer and implementation partner need to work as one team, significantly increasing success likelihood. Customers should not simply wait for final solutions before testing. Ideally, customers remain involved throughout processes, testing feature rollouts and providing feedback. For B2B businesses, finding industry-specialized implementation partners proves particularly valuable.

6.3.2 Addressing Functionality Gaps

Based on the case study and interview insights, organizations should realistically assess when standard CRM capabilities cannot meet their requirements. Functionality gaps emerge across multiple dimensions: product complexity exceeding standard search capabilities, international business requirements demanding market-specific adaptations, template limitations creating maintenance burdens, and integration limitations preventing comprehensive information flow.

Organizations should systematically assess whether standard configuration can address their requirements before pursuing more complex solutions. However, when configuration limitations become apparent, organizations should pragmatically accept that hybrid approaches combining CRM with external tools may prove necessary.

Addressing functionality gaps requires solutions spanning technical configuration, external integration, process redesign, and change management. The case study illustrated this through three interconnected components: CRM configuration enhancements providing parameter management, external tool integration enabling dynamic document generation, and process redesign restructuring workflows to leverage new capabilities. Organizations cannot address gaps through technology alone. They must also manage user adoption, process alignment, and ongoing optimization requirements.

Perhaps most critically, addressing functionality gaps requires managing user adoption of new capabilities. The case study demonstrated that even beneficial improvements require substantial training and adjustment periods to overcome ingrained habits. Involving users in solution development builds change readiness and ensures solutions address actual requirements.

6.3.3 Summary of Key Recommendations

Based on the theoretical framework, case study analysis, and practitioner interviews, Table 7 consolidates the key recommendations for organizations implementing CRM or addressing functionality gaps, organized by the phase of implementation at which they are most relevant. These recommendations reflect consistent patterns observed across both the case study findings and practitioner experiences.

Table 7: Summary of Key Recommendations

Phase	Key Recommendations
Before Implementation	Document and understand business processes; ensure management commitment; assess and improve data quality; consider existing IT landscape; define clear objectives and success criteria
During Implementation	Invest time in requirements definition; designate clear decision-making authority; distinguish processes to standardize from those to preserve; work collaboratively with implementation partners; apply structured change management
Addressing Functionality Gaps	Realistically assess when standard capabilities are insufficient; consider hybrid approaches combining configuration with external tools; balance technical solutions with organizational change management; prioritize user adoption
Long-term Success	Treat CRM optimization as ongoing capability; build internal capabilities for continuous refinement; monitor performance systematically; recognize that success requires continuous adaptation

Source: Own work.

These recommendations provide practical guidance applicable across diverse organizational contexts, while recognizing that specific approaches must adapt to unique circumstances.

6.4 Limitations

This research has several limitations that should be acknowledged. The study relies on a limited number of interview participants (N=4), which restricts statistical generalizability. However, the research design relies on investigator triangulation and purposive sampling to prioritize depth of expertise over sample magnitude. The participants were selected to ensure a comprehensive view of the optimization lifecycle, covering distinct viewpoints: an Implementation Consultant focused on initial deployment strategies, a Support Team Lead

providing insights on continuous development and long-term maintenance, a Regional Director offering a strategic managerial overview, and a Business Representative representing internal user experience and business requirements. This approach aligns with Patton's (2015) maximum variation sampling strategy, which prioritizes capturing diverse perspectives over statistical representation.

The single company focus for the business perspective potentially limits applicability to different industries or company sizes. The heavy representation of implementation partner perspectives may emphasize that viewpoint above the business perspective. The interviews captured perspectives at a single point in time, preventing observation of how gap resolution strategies evolved over extended periods.

Participants primarily represent European business contexts, potentially limiting applicability to other regions. The research relies predominantly on perceptual data gathered through interviews, as access constraints prevented systematic triangulation with objective operational data such as internal technical blueprints or formal project documentation. While the organization reported qualitative improvements in efficiency and user satisfaction, the absence of quantitative performance metrics (such as time savings or error reduction rates) limits the ability to precisely measure outcomes.

The focus on quote generation functionality, while providing depth, means findings may not directly transfer to other types of CRM functionality gaps. Different gap types, such as marketing automation limitations or service management challenges, may require different resolution approaches. Future research examining multiple case studies across diverse functionality gaps, CRM platforms, and organizational contexts would strengthen confidence in the framework and increase its broader applicability.

Despite these limitations, the combination of theoretical grounding, multiple stakeholder perspectives, and detailed case analysis provides insights that practitioners can adapt to their specific contexts while maintaining attention on the success factors identified in this research.

7 CONCLUSION

Resolving the gap between what CRM systems offer and what organizations actually need requires more than technical fixes. The 70-80% failure rate reported in CRM implementation research reflects this challenge. Standard functionality rarely accommodates complex business processes without significant adaptation. This thesis analyzed one such case, finding that success depended on combining CRM configuration with external tool integration, engaging users throughout the process, and treating optimization as ongoing work rather than a one-time project.

The research set out to answer how organizations can successfully bridge the gap between standard CRM functionality and complex business process requirements. This question was

addressed through a literature review spanning CRM theory, business process improvement, change management, and implementation challenges, combined with a detailed case study analysis of quote process optimization at a company using Microsoft Dynamics 365. This mixed-method approach enabled integration of theoretical frameworks with practical insights from experienced CRM professionals and business stakeholders, successfully achieving the stated research objectives.

The case study demonstrated how functionality gaps across multiple dimensions (functionality, usability, performance, and integration) created operational inefficiencies, competitive disadvantages, and user dissatisfaction. Addressing these challenges required systematic gap analysis, hybrid solutions combining CRM configuration with external tool integration, comprehensive process redesign, and structured change management to create the conditions for successful user adoption. These findings align with theoretical frameworks that position CRM success as an organizational challenge rather than a technical one, while demonstrating how hybrid approaches work in practice.

The thesis offers significant practical value. The comprehensive recommendations in Chapter 6 provide actionable guidance for organizations at various CRM adoption stages. The detailed case study analysis offers a concrete example of systematic gap resolution that practitioners can adapt to their specific contexts while maintaining attention on the success factors identified in the research.

For practitioners, this research emphasizes that bridging CRM functionality gaps requires more than technical knowhow. It demands organizational commitment to understanding processes, engaging users meaningfully, managing change effectively, and viewing optimization as an ongoing capability. Organizations that integrate technical solutions with organizational change management position themselves for sustainable success.

In conclusion, while standard CRM capabilities frequently cannot accommodate complex business requirements without significant adaptation, organizations that systematically address functionality gaps through comprehensive strategies combining technical and organizational interventions can achieve meaningful improvements. This thesis contributes one detailed examination of how this bridging can succeed, providing both theoretical validation and practical guidance for organizations seeking to maximize value from CRM investments.

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APPENDICES

Appendix 1: Povzetek (Summary in Slovene Language)

Namen tega magistrskega dela je odgovoriti na raziskovalno vprašanje: Kako lahko organizacije uspešno premostijo vrzel med standardnimi funkcionalnostmi CRM in kompleksnimi poslovnimi zahtevami? Za razliko od obstoječih raziskav, ki se osredotočajo na začetno implementacijo CRM sistemov, to delo obravnava izzive optimizacije po implementaciji, kako podjetja prilagodijo že obstoječe CRM sisteme, ko standardne zmogljivosti postanejo nezadostne.

CRM je opredeljen kot kombinacija poslovne strategije, osredotočene na stranke, in tehnološke rešitve za sistematično upravljanje odnosov s strankami (Rababah et al., 2011a). Raziskave kažejo, da 70-80% CRM implementacij ne doseže organizacijskih ciljev (Tazkarji, 2020), predvsem zaradi funkcionalnih vrzeli, razkoraka med tem, kar sistem omogoča, in tem, kar poslovanje dejansko potrebuje.

Za analizo in reševanje funkcionalnih vrzeli magistrska naloga uporablja tri teoretične okvire: Izboljšanje poslovnih procesov (BPI) po Harringtonu (1991) za sistematično analizo procesov, okvir za analizo vrzeli, ki vključuje oceno trenutnega stanja, identifikacijo vrzeli, definicijo zahtev in razvoj rešitev, ter ADKAR model upravljanja sprememb (Hiatt, 2006), ki naslavlja človeške faktorje, odgovorne za 60-70% neuspehov iniciativ sprememb (Errida & Lotfi, 2021).

Empirični del predstavlja študijo primera optimizacije procesa generiranja ponudb v podjetju, ki je leta 2018 implementiralo Microsoft Dynamics 365. Kljub letom uporabe so uporabniki izogibali sistemu zaradi pomanjkljivih funkcionalnosti za mednarodno poslovanje. Proces je zahteval veliko število različnih predlog dokumentov in ni omogočal potrebnih dinamičnih prilagoditev. Raziskava vključuje polstrukturirane intervjuje s štirimi strokovnjaki s področja CRM implementacije in podpore ter analizo projektne dokumentacije.

Ugotovljeno je bilo, da je podjetje uporabilo hibridni pristop, kombinacijo konfiguracije Dynamics 365 z zunanjim orodjem za generiranje dokumentov (CPQ), kar predstavlja praktično rešitev, ko standardne zmogljivosti ne zadostujejo.

Ključni dejavniki uspeha za reševanje funkcionalnih vrzeli vključujejo: jasno opredelitev poslovnih ciljev, razumevanje obstoječih procesov, aktivno vključenost vodstva kot sponzorja projekta, participativni pristop z vključevanjem končnih uporabnikov v definicijo zahtev in razvoj rešitev, sistematično analizo vrzeli namesto zgolj simptomov ter pripravljenost na kompromise med standardnimi praksami in specifičnimi potrebami.

Prispevek magistrskega dela je v obravnavi premalo raziskanega področja optimizacije CRM po implementaciji ter ponuja strukturiran okvir za prakso, ki kombinira tehnične rešitve (konfiguracija, prilagoditev, integracija) z organizacijskimi pristopi (upravljanje sprememb, vključevanje uporabnikov). Ključ do uspeha ni v tehnologiji sami, ampak v sistematičnem pristopu, ki združuje analizo poslovnih procesov, tehnične rešitve in upravljanje sprememb.

Appendix 2: Interview with Interviewee 1

Participant: Interviewee 1

Position: Support Team Lead Consultant & Senior Developer (CONS 2)

Interviewer: Matevž Kovačič

Date: 19.4.2022

Method: Semi-structured interview

Duration: 25min

MATEVŽ KOVAČIČ: What would best describe your role in the business of providing business solutions? Which term best describes it for you? Service Center, Support, Customer Engagement, etc.?

INTERVIEWEE 1: Even though the most used term, even between our DACH colleagues, is Service Center, I personally prefer Support. Why? The main reason is the meaning of those words. "Service Center" sounds like we are servicing systems that our customers use, and even though that is true, I like to think that we are supporting our customers in their business and everyday usage of the systems we have implemented and are taking care of.

MATEVŽ KOVAČIČ: What are the roles of Support projects?

INTERVIEWEE 1: Support projects include more than just resolving bugs or doing minor modifications. We are here to support our customers in any way possible. And that might include resolution of the bugs, minor modifications of the system, sometimes even implementation of entire modules to improve customer performance or add new departments to the existing system, training and education of our customers, and providing assistance in designing solutions to support their business in the best way possible.

MATEVŽ KOVAČIČ: What do you think are the prerequisites for a successful support project?

INTERVIEWEE 1: The starting point is always a good implementation of the project. When a project goes through a hard time in the implementation phase and things remain unsolved, implemented logic is not done in the best way possible, or there is documentation missing, the support team will ALWAYS have a problem.

However, after a project is in support, I believe there are several aspects to this. Communication is key: I believe that everything starts with communication. If both ends, customer and support team, are aligned, and there is a good vibe, every project is a success. But for that you need project managers or account managers on both ends who are willing to participate, to understand, and sometimes even take blame for the other side just to protect the project and

good relationship. As long as those two people are aligned quite well, the project is usually a success story.

Honesty and trust: There should always be honesty. For sure, mistakes happen, and one of the sides does something that can complicate things even in higher instances. But as long as both sides cooperate and there are no lies between both parties, everything can be resolved in a way that there will be the least amount of harm possible.

Quality: Even with so much trust, good cooperation, and communication, quality is a must. Communication can resolve quite a lot of issues, but if there is a lack of quality, sooner or later there will be problems that cannot be overcome and there will be technological debt, which will result in a lot of political, management, and technological issues.

MATEVŽ KOVAČIČ: What do you think your most successful customers have in common?

INTERVIEWEE 1: Simple answer would be, right people in the right places. As given in the previous answer, this is the key.

MATEVŽ KOVAČIČ: What do you think are some of the biggest challenges of supporting your customers?

INTERVIEWEE 1: Usually, the main issue is understanding our customers. Since we had so many issues with handovers of the projects from implementation to the support team, in the last year even from DACH customer service to Adriatic support team, when you have a missing piece of knowledge about your customer, supporting them is way harder than usual.

Another issue is always resource management. Customers usually want everything and even yesterday if possible. And with one or two customers, that is a bit easier to handle than when you have 30+ customers and all have defined SLA in the contract.

MATEVŽ KOVAČIČ: How do you try to help your customers?

INTERVIEWEE 1: If we skip the part with resolving their critical issues of already existing systems, I believe that our biggest advantage is giving customers a better understanding of what the system can do and how they can use it to support or even automate their business process. The main idea is to take whatever process the customer has, and find the best solution to support that process, or sometimes even suggest small changes to their process if that makes sense, in the system they use.

As mentioned before, one of the important things here is honesty. If I see that what they seek is pointless in the given system, I try to be honest and suggest a different solution. Why? For sure we are here for the revenue, but if you rush the customer into making a bad decision, sooner or later, it will get back to you. I believe that it's better to have one or two change requests less, and with that keep the customer happy, than do everything what the customer seeks from us

and lose that customer in a year or two. At the end, we are here to help our customers on a long term.

MATEVŽ KOVAČIČ: What do you think about Support and continuous development? Should they be separate or one?

INTERVIEWEE 1: This topic is always a bit painful. However, it can be done even with multiple teams involved. But for it to succeed, the main component is communication. As long as all parties are communicating, there should be no issues.

However, I believe that support and development can be done within the same team, but different people should be dedicated for different roles, what to do.

MATEVŽ KOVAČIČ: What would be some tips for your customers with regard to support projects?

INTERVIEWEE 1: Several tips for customers would be: First, issues are rarely as urgent as they would think. Reconsider and think if you can find a workaround for the issue to be resolved. If after that time the answer is still no, then for sure it is critical, but in 90% of cases there is quite a simple workaround.

Second, take your time to describe what the issue is. Make a recording, add screenshots, describe as much as you can. It will take you several minutes more, but it will for sure help the ticket to be resolved way faster, because there will be no need for additional pointless communication just to gather all that information.

Third, discuss any requirements with your consultant, project manager, or anyone else from customer service. We are here to help you grow, to support you with your wishes and requirements, and we for sure have better knowledge about the capabilities of the systems. Use that.

MATEVŽ KOVAČIČ: What do you think are some of the biggest mistakes companies can make with regard to support?

INTERVIEWEE 1: Probably unreal expectations. Firstly, when the support team gets involved, there is no chance that they will know about the project as much as the implementation team or customer. Try to support them and don't give them a hard time if they don't know every detail about the project.

Secondly, yes, you are an important customer to us, and we do everything to assist you as fast as possible. But sadly there is a limited number of people in the team, and if we cannot do everything immediately, escalation usually helps only once or twice, but it will for sure make a bad vibe between all parties involved.

MATEVŽ KOVAČIČ: What do you think customers have to deliver for a successful support project?

INTERVIEWEE 1: I would split this into two parts. Let's call them must and nice to have.

Must: A good project manager, and a single point of contact, usually the project manager, who will collect all reports, requirements, etc., and be the only person to contact the support team. For special cases this can change and someone else can report a ticket if it's a blocker or something urgent, but it should be more the exception.

Nice to have: Business knowledge. Sometimes the support team knows how it was implemented, but the missing part can be why. And this is a part of the customer to explain why exactly that is used and why it is important for them. Even though it might be pointless sometimes for the customer, it can bring quite a lot of value to the person working on the functionality.

Appendix 3: Interview with Interviewee 2

Participant: INTERVIEWEE 2

Position: Regional Director Customer Engagement (MAN)

Interviewer: MATEVŽ KOVAČIČ

Date: June 22, 2022

Method: Semi-structured interview

Duration: 20 min

MATEVŽ KOVAČIČ: How involved should management be in implementing CRM? What is its role and responsibility?

INTERVIEWEE 2: In successful projects, you are more likely to find management being more deeply included in the implementation process. In its essence, implementing CRM is change management, and if you do not have the support of management you will find it hard to convince people to change their daily processes. Management needs to know why this change is taking place, what the benefit is, and what is the return on investment. If management knows these things, it can be confident that this project makes sense. As a rule of thumb, management should be included in the implementation process at the steering and coordination meetings at least once per month. It also depends on what kind of an organization we are talking about. A large corporation is more likely to be effective in introducing change as it is more heavily developed around hierarchy and structures which are built to funnel these changes to their designated level. I would say it is harder in smaller companies.

MATEVŽ KOVAČIČ: How important are clear predefined business processes? And should companies be willing to change them?

INTERVIEWEE 2: It depends on what the company is trying to address. Are you trying to use CRM to support certain processes that could make you more competitive, but you are still doing them manually at the moment? In that case it makes sense to systemize these processes. However, if you are not so sure about your processes you should consider business consulting and then try and implement the result of that in a system, one of which could be CRM.

MATEVŽ KOVAČIČ: What do you think successful projects have in common? Do you see a pattern?

INTERVIEWEE 2: A successful project is a combination of multiple aspects. First, the vendor and customer need to work as a team. This increases the chances for success significantly. However, if the customer and the vendor are on separate poles then it makes it a lot more difficult. Features should be introduced regularly, and the customer tests them right away and gives feedback. This agile–Waterfall–Hybrid approach has proven to be successful. The customer should be involved the whole time validating the progress and direction of the project the whole time. The presence of management is again very important. I do not know a successful project without involvement from management. However, at the end of the day, as it so often does in business, it comes down to trust between two parties.

MATEVŽ KOVAČIČ: What do you think more unsuccessful projects have in common? Do you see a pattern there as well?

INTERVIEWEE 2: Actually, it is the exact opposite of my previous answer.

MATEVŽ KOVAČIČ: What should companies consider before adopting CRM?

INTERVIEWEE 2: It depends on what problem they are trying to solve. Companies need to have a goal and strategy. The way to that goal does not necessarily have to be fully clear, but they do need to have a goal and a strategy in place while also knowing why they want to adopt CRM. ROI justifies the investment, but what you will actually achieve and how that coincides with your strategic focuses as a firm needs to be very clear indeed. At the end of the day you do not need CRM to manage your relationship with your clients. However, if management believes that these processes will push the company forward, you also have more leverage to push this change through all levels of the company. If management is not entirely sure, and it is considered more of a "nice to have" feature, then it is much harder to push it within the company. This is often the problem or wound of smaller projects. The adoption is bad because it's just a nice to have feature and not an essential system like ERP for sending out invoices.

MATEVŽ KOVAČIČ: What do you think is the added value of CRM?

INTERVIEWEE 2: Personally, I do not like the abbreviation, because it is a black box and no one really knows what is inside. Is it just an address book of clients? I believe a much better term is Customer Engagement. It is a combination of solutions, processes, and a mindset. The benefit of this is the standardization of processes, a single point of truth, and shorter onboarding times. These I would say are the added value of CRM.

MATEVŽ KOVAČIČ: How much of the implementation process can you standardize and how much will always be individualized based on the customer?

INTERVIEWEE 2: It depends. If you have clients from completely different industries that means a lot more configuration and starting from scratch. However, if you specialize in one industry then you can standardize the process to a much larger extent. Being an expert for CRM is not enough, you have to be an expert on the industry that you are implementing CRM in. Ideally a company finds such a partner, simply because industries are so different, and it comes down to things like language used and jargon. An industry expert will understand these things right away whereas someone who is not an industry expert needs to get to know you and your industry, which takes time.

Appendix 4: Interview with Interviewee 3

Participant: INTERVIEWEE 3

Position: CRM Implementation Consultant (CONS 1)

Interviewer: MATEVŽ KOVAČIČ

Date: 13.01.2022

Method: Semi-structured interview

Duration: 20 mins

MATEVŽ KOVAČIČ: What can companies do to prepare for CRM implementation?

INTERVIEWEE 3: First, companies should check what are their internal wishes and requirements. Wishes not in the sense of desires, but where the company wants to get with this implementation, what they want to achieve, what they expect. Why they are embarking on the project. I often notice that customers only think they need CRM, but it's not entirely clear to them why they need it. Once it's clear why the company wants CRM, that's the moment when they approach the implementation partner.

MATEVŽ KOVAČIČ: Who should lead this process in the company, or who is the person who must define why the company needs CRM?

INTERVIEWEE 3: There is no specific position, but it's important that there is one person in the company responsible for this, who also coordinates and connects all stakeholders. This person must be appointed by management and must have management's support. It can be someone from the business, it can be IT, who is competent enough. Usually these are people involved in primary departments, Sales, Customer Service, or Marketing. Usually one of them has a problem and from there comes the need for CRM.

MATEVŽ KOVAČIČ: Do you think companies should be willing to accept compromises during implementation, and if so, to what extent?

INTERVIEWEE 3: Definitely they must be willing to accept compromises. Solutions are set up in a certain way and because of that, best practices exist. It's good if companies stick to these best practices. In this way, processes can be improved, which means that the company will have to change certain processes. To what extent? Companies must know themselves what are processes they must perform but could still be optimized, and what are processes that bring them added value in the market, these processes must not be changed and this must be adhered to during implementation. This part needs to be customized and companies must not deviate here, and we as implementers must not force them into this.

MATEVŽ KOVAČIČ: What are roughly the main phases of implementation and what characterizes each one?

INTERVIEWEE 3: First it starts on the company side, that this desire is clarified. From the implementer's side, a Discovery is performed, to see if these desires are justified, if the customer has a clear picture, if we can help them. When we determine what is the added value of this project and in which direction we are going, then definitely follows an in-depth analysis, where all main actors must be present, key users, IT. So that when this process is concluded, we know what are the main priorities, what are things that are less critical but we can improve them, and when this is clear and when everyone knows where we're going and what is the expected result. This is then followed by solution development, meaning system customization and so on. When all this is concluded, a testing period must follow, so that before things go into production, it's verified from both sides. This is important, that critical processes are covered and what was expected is done. When it goes into production, there are always certain difficulties that always arise. Certain things only show themselves in production use and there must be a certain period of active monitoring and support from both sides.

MATEVŽ KOVAČIČ: What are the main challenges of CRM solution implementation?

INTERVIEWEE 3: From the provider's side, it's definitely hardest to get the right requirements, which are in such a form that they are equally clear to both sides. Most often it happens that a requirement is written and either A) it's a requirement of only one side of the company and the other side of the company doesn't agree or is left empty-handed, or B) what is written, the provider and the customer understand in a different way and in the end when the result comes, there isn't such satisfaction as there could be.

MATEVŽ KOVAČIČ: What do good implementation examples have in common? Have you noticed any patterns that repeat?

INTERVIEWEE 3: That the customer is aware that this is not a technical implementation where some IT person comes and sets up or delivers a product. But that this is a project that for success needs a lot of invested time also from the customer's side, time of sponsors and management. This is something that companies are not aware of. They think they pay for some tool and the vendor comes to set it up and that's it. Such projects are always unsuccessful. All projects where we had enough support from management and business were successful in the end.

MATEVŽ KOVAČIČ: What do bad or less successful implementation examples have in common? Where did it get complicated?

INTERVIEWEE 3: In essence, the opposite of the previous answer. So it's desirable that on the customer's side there is one person who has the complete picture and brings together all decision-makers. A very common reason that a project was unsuccessful is that there wasn't one decision-maker but there were 10 people from different departments who had requirements that excluded each other, and in the end no one is happy. Someone always has a negative opinion and whatever you do on such a project, someone will be dissatisfied in the end.

MATEVŽ KOVAČIČ: What would be your advice for companies thinking about CRM implementation?

INTERVIEWEE 3: Mainly that this is not a technical project. It's necessary to know what we want to solve. That this is an implementation process with the purpose of changing business processes and that the tool actually doesn't matter, whether it's Excel, Dynamics, or something else, the key to success doesn't lie in the functionalities of the IT tool.

Appendix 5: Interview with Interviewee 4

Participant: INTERVIEWEE 4

Position: CRM and CPQ Implementation Specialist and Business Representative (BR)

Interviewer: MATEVŽ KOVAČIČ

Date: 17.05.2023

Method: Semi-structured interview via Microsoft Teams

Duration: 25 min

MATEVŽ KOVAČIČ: So the first question that I have for you is, what do you think are the most important aspects of quotes or CPQ in general? What are the first things that come to your mind, and what do you think is important within that process?

INTERVIEWEE 4: Well, thinking quickly, the first thing is the possibility to manage and add the products, both existing products and write-in products, custom ones, and the possibility to manage prices in different currencies and for different price lists. Because in big organizations, you can have different sales offices spread all over the world, and so you need different price lists with different currencies and also discounts, because depending on the area, you can have different discount levels. So another point is, for sure, the possibility to manage discounts both at the item level and total level.

Remaining on the price-cost point of view, the possibility also to manage cost to automatically look at margins with different logic, because each company has its own logic, but at least the basic one, cost, price, and discounts.

From a revenue point of view, the possibility to manage price lists, currencies, prices, list prices, item prices, material prices, cost, and discounts at line level. And then, if we go more to the CPQ side, but also on the CRM side, the possibility to manage in a correct way the products. What that means is to manage the configuration, because it depends on what you are selling. You can sell simple systems or simple products, just like a boiler, and that's all. Or you can sell more complex things. And so for that, you need to have, for example, relationships within products to define the relationship, so you have the main product and all the accessories needed to install, for example, in our case, the product, or to make the product work correctly.

The possibility, if we speak about CPQ, to generate and configure rules, because maybe the product can be a simple product, but then you can have a more complex one. But also simple products could need rules. For example, a stupid example, I have a car configurator that usually is the common example for CPQ. You say, okay, I would like to have, I don't know, the Ferrari. And when you choose some functionalities of the Ferrari, of course you can't use the same functionalities as a Panda, that is a small car in Italy from Fiat. So based on logics and rules the user has configured, the product will be automatically guided to use a specific set of products or not, depending on the main one.

And the other thing about CPQ and quotes in general that I see a lot is the possibility to also manage alternatives and optional items. Because this, I think, is always used because you are selling the car. And from a basic point of view, the car is white. And you say, okay, as an optional I can give you the red car, and it will cost more, but the quote is still on the white car. And plus, you have the possibility to have extra quotes. So the total will be the one related to the white one, but then you have lines not included in the total, saying, if you want the red one you have 100 euros plus, etc., for optionals and also alternatives. I can give you a boiler plus a solar system, or I can give you the same boiler plus the solar system but with different connections.

MATEVŽ KOVAČIČ: Do you think that larger companies, such as the one you're part of, are more likely to need all of these fine-tuning tools to be able to have more control and offer these alternatives, have margins calculated, have costs already calculated? Or do you think for a small

business, the most common example is like a bicycle company that sells one type of bicycle, they have a couple of types of frames, a couple of types of tires, that when you see what Microsoft offers kind of out of the box, that for a small company that is enough? But because your process is a lot bigger, your offering is a lot larger, much more diverse, much more specialized, that in your case that simply isn't enough?

INTERVIEWEE 4: You can build something already within Dynamics, because you have relationships between products, you already have the possibility to save cost and margin, look at margin, etc. But if you are a simple situation, I think Dynamics would be enough. But if you need to configure and to offer and to make a more advanced proposal, you need something more.

It's not only Microsoft doing this. Microsoft doesn't have a CPQ, so you need a third-party tool. In the past, I also worked on Salesforce. Salesforce already has a CPQ, for example, so they know that at a certain point they need the CPQ, because if the level of their product is a bit more complicated, you will need it. But also they have external partners with more advanced CPQ. So it depends, as you said, on the products you are selling and the needs of the company. But if you're starting to sell something a bit more complex, you need the CPQ.

MATEVŽ KOVAČIČ: So you think that's also the reason why, in your case, the company chose to adopt a more comprehensive system that allows you to do all these things?

INTERVIEWEE 4: Yes. Also in my former companies, we had Dynamics as well. It was on-premise, an old one, 2016. But we had a specific, more powerful CPQ than the one we have now in the company, because my former company was working on big systems and machines. So if the product becomes a bit more complex, you will need, sooner or later, to work on a CPQ or something created custom in Dynamics to improve the functionalities.

MATEVŽ KOVAČIČ: With the current situation that you have now, do you think you knew enough at the start when these things were getting adopted? I don't know if you were present at the very beginning.

INTERVIEWEE 4: I was not present at the very beginning. When I joined the company, I worked on the implementation of CPQ, and D-Lab was already the partner. So I only worked on implementation of it in Italy. The software selection was done, I saw the Excel files and the documentation that they sent to the different CPQ vendors.

The requirements were very simple at the time. I think they underestimated a bit the configurator, because they asked simple things such as the possibility to add boom items in the configuration, the possibility to manage prices and discounts both at line level and total level. So very basic requirements that theoretically you could manage also in CRM.

But now that we are reviewing with them the CPQ, I noticed that at the end, maybe they are trying to work with workarounds. They always arrive at the main points that are rules between

items, so if a product is mandatory related to another one, is optional, is linked or not. Alternatives, optionals, these are the three main topics for me. So rules, the possibility to manage alternatives and optional items.

Of course, the document, the proposal document that you will print through the CPQ was a requirement and should be well structured. And other things they asked, the tool should be simple for users, so the UI should be simple, etc.

MATEVŽ KOVAČIČ: It tends to really be hard to know exactly what to clearly define as requirements before you're actually working with the system. That is such a hard thing to do, to know ahead of time how things are going to look, where things could go wrong, what is enough, what is not enough.

INTERVIEWEE 4: In our case, we are always working with CRM admins, and I think that sometimes that is not the real choice. I think we should, and I'm thinking how to do it, we should work more with the business. Because what I noticed is that the sales key users, also in the meetings we are having now on opportunities and quotes, are asking and telling us things that are different from the ones I collected in meetings with the CRM admins. So you should work with them, understand how they are working, understand the pain points, and find a good solution for them.

MATEVŽ KOVAČIČ: How important do you think quote approval components are? Every system handles that bit a little bit differently, so I would just like to get your thoughts on how important that is.

INTERVIEWEE 4: It's important. As far as I know, I always saw the approval workflow in quotes, because every time you touch a discount or you're using a price list or something like that, usually an approval is needed by the manager or the director, depending on the level of the proposal. So both here, in previous companies, and also when I worked as a consultant, approval workflow is always there. And the bigger the hierarchical structure of a business is, the more it is needed.

Linked to that, approval could be based on price and discounts, but also from a technical point of view. For example, I'm configuring the system. I'm a sales guy. Maybe I'm a senior one, but I'm not a technical one, so I will need, also, if the system is very complex, an approval from a technical point of view, from a pre-sales or a technician or field engineer or something like that. So that also should be taken into consideration.

MATEVŽ KOVAČIČ: There's quite a lot of differences between how a quote should look like when you're sending it out, I don't know, in Germany, in Spain, in Italy, or anywhere else. There are certain conventions almost. I think in Germany they have a way where it's almost expected that you get a certain discount if you pay very quickly. Do you think that also plays into the fact that if you want to support a multinational company, you need a more robust system that can handle such differences between how quotes are handled?

INTERVIEWEE 4: This is, as you said, up to the country, because each country has its own way of doing things and legislation. What I saw, not here in the company, because I think this is missing and they're not managing it, or they are managing in a very standard way, is in the proposal document. But it depends on the document, because you have the proposal documents and then you have the confirmation, the contract, so you have different levels of documentation.

But also in the proposal, usually you have a specific chapter about services and legal stuff. And so having the possibility to manage services within a quote in CPQ and also in CRM and then also in the proposal is a plus for sure, because services could be different country by country. So having the possibility to configure them and to manage them within a quote without affecting the technical items is important.

For example, you have the payment terms, delivery conditions, all the stuff related to the quote. If the quote total amount is above a certain price, automatically transportation is free. Otherwise, transportation has a different cost. The installation cost, all this kind of services should be configurable in the quote and also printed in the proposal.

MATEVŽ KOVAČIČ: That brings us to the actual design of proposals and quotes that get sent out in the end. How important do you think is that? On the one hand, just the visuals of it, does it have to be pretty, or doesn't it have to be pretty? And the other part is, how customizable is the actual financial information, the table so to speak, that you can put into that quote?

INTERVIEWEE 4: Usually the proposal has the header with the information of the customer and the company selling the product, some introduction. Then you have the grid of products with the amount, the net price, if you want to show the discount, alternatives, optionals, and services. And then one thing that is always requested, both by the user but also by the customer, is the description of the items you are selling. So you have the grid with 10 products, but then for each product, usually they would like to have a good description of the product with the image of the product, for example, to make it more clear.

And in the ideal world, and in a good CPQ, all this kind of information should be related to a PIM or a DAM, a Product Information Management tool or a PLM or a DAM system, where you have all the images, the documentation of the product. So automatically, when you select the products, automatically the proposal will include all the information about that product, because it's always requested by the customer and also by the users.

Now, for example, in our CPQ, we don't have the possibility to link external documentation, images, etc. So if you want to have images of the product, descriptions, etc., you need in the CPQ, in D-Lab, to manage them one by one, save all the information in D-Lab and then link or refer to that information within the proposal.

MATEVŽ KOVAČIČ: So in the end of the day, it is quite important how the quote looks like?

INTERVIEWEE 4: Yeah, it depends. If it is the first proposal, just the price, the grid is enough. But then if you have more advanced steps, you will need to print that information.

MATEVŽ KOVAČIČ: Do you think there's a difference between B2B and B2C, that you would want to have your proposals look different if it is the end customer, or if it is just a business like an installer?

INTERVIEWEE 4: It depends on the products. But imagining, I'm trying to think about an air conditioner. If I'm selling it to an installer, I think that installer would like more details about the accessories, etc. If I'm selling it to an end user, I think that the image of it is enough. I don't think an end customer will look at all the BOM of the configuration, but only at the final product. So I think there could be a difference between B2C and B2B, and then it depends on the products, of course.

MATEVŽ KOVAČIČ: And then we have the last question, which is, do you think you as a business have currently realized all your business needs with the way you're currently using quotes, proposals, and CPQ? And if not, how far do you think you are from the ideal situation that you would want to have?

INTERVIEWEE 4: We have not realized the business needs. How far we are? I think this, our current opportunity and quote forms and logic is not so clean. It was built, I saw a lot of documentation. So there was, I think, a lot of effort in trying to analyze what is needed, what was needed, etc. But then also looking at the meetings we have now, users are not using it with that logic. And so I think we should have more of the business involved from a business analysis point of view, and not us, because we are IT. So it's the business that should define the processes. And at the moment, I think we are still far from the ideal situation, because each operating company has different requirements still, and we are not covering all of them at the moment.

MATEVŽ KOVAČIČ: In comparison to the previous companies that you worked for, were you ever in a situation where you really thought, yes, all our business needs are actually met with this system?

INTERVIEWEE 4: I think my former company was 95% covered, and then we had small requirements to cover, but they were also important things. So I think you can arrive at the end. For sure, I think it is possible if it is well defined with the business. But the business should have clear requirements, and it is difficult. If it is well defined and there is good sponsorship, you can arrive there.

MATEVŽ KOVAČIČ: Do you think it makes it a lot harder to reach that final goal in a business where you have multiple companies where, at the end of the day, they always work a little bit differently?

INTERVIEWEE 4: Yeah, you have more differences, and so it will be more difficult. Whenever you try to realize something for someone, you're taking something from someone else, always, on the business side.

Also in my former company, we had a quote in Italy, but then we had sales offices all over the world, all the other markets, European, Asian, America, etc. But the direction from the sales director in Italy was everybody will have the same CPQ and the same logic. The only differences were the price list and the discounts and approval workflow rules, because it depends country by country. But the technology and the solution was the same for all the countries, and the direction was clear. So everybody should have the same things without the differences.

So if you are like this, it's simple, because you will start, you collect all the requirements, then you try to do the things that cover almost everything, but then you have the sponsorship saying, okay, it should be the same. And so let's work like this. If not, it becomes difficult, because if you need to cover all the markets, already now we see that Italy has a completely different logic than the others in the company. Also Denmark has completely different logic than the other countries. So they are very far, but you can find commonalities and try to work on them. But yes, it's more difficult.