Customer Relationship Management System a Case Study on Small-Medium-Sized Companies in North Germany

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1 Introduction

Globalisation and in particular the fast growth of Internet caused a decrease in local and closed markets. Transparency of markets is further increased by services to compare products and prices on-the-fly; allowing the best overall acquisition for purchase (Stengl et al. 2001). This increased competitive pressure (Müller 2004), in especially the convergence of product quality and their prices (Hippner and Wilde 2005), affected the companies' opportunity to identify themselves through their core products alone. A differentiation towards the competition could be achieved by offering extended services beyond the product; a high-quality customised liaison and support for the customer (Brendel 2003). Rather than focusing on transactions and products, the importance of the customers and especially the nurturing relations with them was emphasised (Hippner and Wilde 2005). The competiveness increased the high cost for customer acquisition (Rapp 2000) such that the long-term binding of customers and maintenance of the relationship became a new business field (Sexauer 2002). The gain in effectiveness and efficiency of supply chains resulted from aggregating, managing, and analysing customer information and actively integrating these in the operational process (Buck-Emden and Saddei 2003).

The objective of long-term customer satisfaction is not necessarily related to the products and service anymore, as this could be equally delivered by competitors, but on targeting future sales and other opportunities to interact with customers. Studies repeatedly demonstrated that a strongly bound customer positively affects the success of enterprises. Depending on the sector, reducing the churn by as little as 5 % can result in a significant increase in revenue (Diller 2006; Stengl et al. 2001).

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Support for customer loyalty and relationship management can be achieved through sophisticated customer relationship management (CRM) systems, which have become increasingly important with the advances in information technology over the last decades (Helmke et al. 2001). Successfully applied CRM-philosophy and CRM-systems generally contribute to the success of enterprises; see e.g., study by Terlutter and Kricsfalussym (2006). Nevertheless, small- and medium-sized enterprises (SME) still have a historically evolved Information Technology (IT) system landscape with numerous independent systems for marketing, sales, or services (Loh et al. 2011; Schulze 2002). The diversity and generally decentralised structure often contradicts attempts to maintain a correct, consistent, complete, and up-to-date database with customer information; not enabling the before mentioned customer support and satisfaction (Schumacher and Meyerm 2004). Hence, system integration in all business units is core function of CRM.

The main contribution of the chapter is about creating awareness for the importance and benefits of CRM-systems for SMEs. The following section presents a short overview about what functionality is supported and how SMEs can benefit from the system integration. After describing the outline of our research, we discuss the survey on the state-of-the-art of customer relationship management systems and the degree of pervasion in SMEs, and the data analysis. The results are crosschecked via expert interviews; i.e., to verify that the results from the survey are valid and to gain further insight in CRM systems beyond the questions on the questionnaire. The experts were invited from 4 different SME; all being in charge of the CRM systems and the CRM integration. The organisations are active on international markets, 3 of 4 do Business-to-Business, and all are market leader in their area of expertise.

2 Small- and Medium-Sized Enterprises

In this chapter, we restricted the scope on small- and medium-sized enterprises as the pervasion of sophisticated CRM-systems is still considered to be at an early stage (Horn 2007; Kemper et al. 2005; Loh et al. 2011); even though the market development and increased global competition dictates a stronger reflection and integration of customer relations (Koelwel 2006). A further observation during our study revealed that even with CRM-system availability, most enterprises do not take advantage of the full potential of the systems as they either lack a full integration in other systems or business units, or are not trained to use the functionality efficiently or at all, respectively. In our study, we set the scope as following:

- **North Germany**: Lower Saxony, Hamburg, North Rhine-Westphalia
- **Small- and medium-sized enterprises**: SMEs represent 99 % of German enterprises; even though the criteria for SMEs vary with respect to, e.g., number of employees or annual revenue, [quantitative criteria, (Horn 2007)], ownership or type of management [qualitative criteria, (Wolter and Hauser 2001)].

The criteria vary from country, industry sector, and organisation; thus the EU is having other criteria (e.g., number of employees, revenue) than those would be used in Germany. Due to the focus of the paper, we are not further exploring this; see the applied criteria in the Section "Survey". Note that we did not consider criteria as revenue, profit, or market position.

- **Industry/manufacturing**: In Germany, the proportion with respect to the overall production is relatively high with strong dependencies on customers (in general in a business-to-business context) and suppliers. We focused further on the following industrial sectors: metal processing and manufacturing, mechanical engineering, industrial plants, and electro technique. This focus is due to the generally low affinity towards CRM-systems (Gohr 2007) in these sectors as they tend to have a higher stability customer retention, particularly in comparison to telecommunication providers or financial service providers.
- **Focus on functionality**: The undertaken study was not about specific systems [see, e.g., studies by Horn (2007), Kemper et al. (2005), Torggler (2007)] but the general pervasion of systems and the kind of applied functionality and integration.

3 Customer Relationship Management

The focus of the chapter is on the survey about the perception of CRM in SME. Therefore, we are limiting ourselves on a short introduction and do not elaborate every CRM definition and approach. In general, CRM is a customer-centric strategy, where the enterprise utilises people, processes, and technology to support a holistic long-term customer retention and relationship development; including marketing, sales, and service concepts (Chen and Popovich 2003; Hippner and Wilde 2003). CRM represents characteristic principles about customer orientation, economic feasibility, systemisation, individualisation, and IT-systems (Homburg and Sieben 2005); the latter one being the focus of our survey. In general, IT-systems do not guarantee an improved customer relationship; yet are essential to realise CRM-strategies in the first place (Schwetz 2006). Here, we define a CRM-system as a holistic approach to merge functionality and information in an IT-system to administrate customers and their relationship with other organisations. A CRM-system must be considered as the core of any CRM-concept.

3.1 Background to CRM

CRM originates from the continuous progress in IT and networking; where the formerly large number of isolated systems (e.g., marketing databases, computer aided selling, or online marketing) is integrated to create a holistic system

(Stengl et al. 2001). The alignment and replication of enterprise-wide customer information allowed a more efficient and effective handling of customer related activities (Helmke et al. 2001). CRM can be tracked back to relationship marketing, an operative instrument to create, administrate, and maintain customer relations (Berry 1983; Grönroos 1990); with inclusion of relationship management for suppliers. CRM-systems distinguish themselves from former customer-retention-systems by comprising customer acquisition and customer win-back (Hippner 2006). The rush for CRM-systems was started by a report about the trend to gain advantage by analysing and forecasting customer information (Stengl et al. 2001) and hyped in the early years of the millennium (Hippner and Wilde 2005). The high expectations in integrated systems was contrasted by the circumstances that projects were managed by the IT departments; missing crucial considerations about strategic and organisational aspects (Stengl et al. 2001). Projects mainly failed due to missing acceptance by the stakeholders (Diller 2006), the technical focus (Andersen and Andreasen 1999), and missing cost-benefits-considerations (Stengl et al. 2001).

Over the last years, the IT-focused approach was redefined after some years of stagnation by a more comprehensively perspective on all requirements to administrate customer relations (Zähres 2007). Larger companies realised that beneficial systems need to go beyond a pure CRM-system and need to be an enterprise-wide strategy about objectives, processes, culture, and employees (Bauer and Oswald 2007). Only smoothly integrated processes concerning the customer allow taking advantage of the potential inherited by CRM-systems (Stengl et al. 2001).

The permeation of CRM-systems started with large enterprises, while SMEs still relied on other solutions like office software and mail applications. A noticeable change occurred with the strengthening of supply chain integration, where mandatory systems were dictated by large enterprises, and stronger competition on relevant markets. In addition, the customer received enhanced tools to search and analyse markets for best offers, causing a shift in enterprises from pure goods and service providers to actually focus the core business on the customers' needs (Schmid et al. 2000).

According to functionality and main purpose of application, we can distinguish three main categories of CRM (Kemper et al. 2005).

- **Operative CRM**: Support for day-to-day business in CRM-relevant areas like sales, marketing, or services. Here, most information and data about customers is collected, processed and stored in enterprise resource planning (ERP) systems.
- **Communicative CRM**: Control and synchronisation of all customer-oriented communication in sale, marketing, and services. The idea is, that enterprises have "one face to the customer" (Horn 2007). Furthermore, inter- and intra-organisational collaboration is supported; providing opportunities for e-marketing, e-selling, and e-services (Buck-Emden and Saddei 2005; Gerdes 2005; Neckel and Knobloch 2005; Schnauffer and Jung 2004).

- **Analytic CRM**: Establishing one source of rich data and information to analyse customer interactions and create forecasts with different horizons. Data mining and knowledge discovery tools are used to predict customer requirements and adjust customisation processes (Hippner and Wilde 2008).

In our anticipated target group (SME), we expect—if CRM-systems are used at all—to see mainly operative CRM-systems as a comprehensive integration is mandatory before extensions like communicative or analytic CRM can be applied or even considered. With limited resources for advanced IT departments and overhead to train and use CRM-systems, the main focus of SMEs is set on keeping the operative data-to-day business alive (Kemper et al. 2005).

The main objective of CRM is to build and maintain a long-term, profitable customer-relationship (Diller 2001; Hippner and Wilde 2002). The importance of (voluntary) customer retention is given as it generally results in higher customer satisfaction (Herrmann and Johnson 1999), opportunities for up- and cross-selling and often a disposition to sell further products for higher prices and (Homburg and Bruhn 2005; Schumacher and Meyerm 2004). The economical perspective covers the customer value, the sustainability, and intensity of customer services (Günter and Helm 2006), and the effect on monetary and non-monetary targets (Cornelsen 2000; Gelbrich 2001; Schemuth 1996). The complexity often limited the integration of enterprise-wide needs and resulted in maximizing the profit/customer value, but did not consider the advantages for customers or business partners (Buck-Emden and Saddei 2005). Integrated CRM-systems allow a systematic exploitation and distribution of information and, therefore, holistic customer evaluation for whole supply chains (Hippner 2006; Homburg and Sieben 2005).

Systems are supportive tools and an essential requirement to achieve objectives; yet, their success depends on further factors; i.e., humans, processes, and management. Case studies by Gartner Group showed that 70 % of the problems during the implementation of new systems is not caused by the software itself (Nelson and Eisenfeld 2002). Acceptance and application is a critical success factor and often forgotten if decisions are made without inclusion of all affected departments (Jensen 2005); e.g., if the initiative is coming from the IT department with focus on the storage and administration of customer information. These systems often end up as a control and monitoring system and provide limited value for customer liaison; sometimes even reducing productivity (Buck-Emden and Saddei 2005).

3.2 CRM-Systems in SME

The market for CRM-systems is still expected to be growing, with over US \$6.6b in revenue and US \$3.6 b in maintenance (forecast for 2012, n.n. 2006). An analysis by Gohr (2006) showed that the proportion of CRM-systems in SMEs was increasing and forecasts a growing trend. With a large proportion of SMEs considering office and mail-systems to be an appropriate tool for managing customer

relations, the CRM-potential is significantly underexploited; i.e., regarding changing market structures, stronger competition and higher expectations in service (Koelwel 2006; Schwetz 2006). The selection of a CRM-system for SMEs often involves various difficulties and challenges not being given for larger enterprises. Main arguments to support this are (1) traditionally grown systems emphasise the storage of customer data (Kemper et al. 2005); (2) lack of transparencies for most CRM-systems addressing CRM issues; i.e., regarding 4 cost, depth of integration, benefits; (3) high number of solutions and software providers with large variety in functionality; (4) insufficient experience regarding large IT-integration and priority on core operational day-to-day-business (Kemper et al. 2005); and (5) limited resources for an integrated IT (Brehm et al. 2008). Brendel (2003) analysed how CRM-implementation projects differ depending on the size of an enterprise. In SME, the implementation is done iteratively by installing single functionality in each step to increase acceptance with stakeholders and to keep the complexity on manageable levels; e.g., installing support for management of contacts, tasks, sales, offers, and orders in separated steps (Brendel 2003). This bottom-up approach is often neglected by larger enterprises as they consider CRM as a vision that requires complete commitment rather than single functionalities (Stengl et al. 2001).

The tendency to restrict the usage of CRM to basic functionality can be observed in most SMEs; often they just use address and contact management as well as basic sales controlling (Brendel 2003). Brendel (2003) differentiates between elemental and advanced components of CRM-systems: elemental components like address-, contact-, and appointment-management, offer and order administration, and opportunity management; advanced components like Internet integration, workflow management with all business units. In general, operative CRM is of greater interest to SMEs; i.e., sales controlling and complaint management (Hippner 2006; Kemper et al. 2005). Using only part of the CRM-systems limits the outcome and often only sub-optimal results are achieved (Kemper et al. 2005). Brendel (2003) depicts that even centralised address management could contribute over 50 % to the success of CRM. Brendel (2003) also shows that projects introducing CRM often ignore customer-oriented processes and strategies but focus on the pure system installation and integration.

4 Survey

We used a mixed approach with an anonymous online questionnaire and aligned expert interview to verify and intensify the survey results (Schnell et al. 1999). The main objective of the survey was about the *where* and *how* CRM-systems were used, *what* the companies aimed for, *how* well the CRM-system was integrated, and *which* problems occurred. We did not ask for specifics about the software brand (Horn 2007), IT security, or any organisational questions (Kemper et al. 2005); as this was done in previous surveys. Due to these restrictions, the transfer

feasibility of outcomes to other industrial areas might be limited and has to be evaluated on future test samples. The survey was done in cooperation with the Institute of Information Systems, University of Hamburg, and C: 1 Industry Projects & Solutions. We used' ABC der Deutschen Wirtschaft' (database for enterprises in Germany; program name: ABC Quellenwerk CD-Buch 2007.3) to access over 230,000 profiles and addresses. The database accuracy for revenue was below our threshold; therefore we limited the selection on number of employees as well as industrial area and regions. We used an online survey to simplify distribution, improve acceptance by participants, increase the turnover rate, decrease the cost, integrate dynamic question selection, and gain access to a broader number of enterprises (Broda 2006). We did not expect a media objection as we expected familiarity with IT for their daily business activities among the target group. We used the software' umfragecenter 5.1—Surveycenter' by n.n. (2008).

The selection process was designed as follows: (1) select all enterprises with 50-1, 200 employees; (2) deselect enterprises which are subsidiaries for larger enterprises; (3) deselect all not in one of the following industry sectors: electro-technique, metal industry (iron, steel, further metal), mechanical engineering; (4) deselect if not located in North Germany with zip code areas 2, 3, and 4; (5) deselect if they have no identifiable contact address; (6) randomly verify previously not selected enterprises for inclusion/exclusion. Regarding SMEs, we anticipated that the sales manager or the sales group is most knowledgeable about their CRM-system, and most likely observed or participate in the launch of the system itself. Where possible, we investigated the name and email-address of sales managers; otherwise the document was sent to the main office or front desk with a request to forward the survey to an appropriate manager (we verified the validity of the information by calling a small random sample; the result of 60 % was low but still valid with respect to our targeted return rate). Finally, we processed the data for the mailing procedure; i.e., improving the formatting and the choice of appropriate form of address. In total, we had **1,422** records with sales manager names and **931** data sets with just the name of the enterprise requiring the involvement of the front desk. Of these 2,353 emails, 212 had non-working addresses. After the initial distribution, reminders were sent after 10 days; an additional distribution of the survey in online networks like the German version of LinkedIn (Xing) did not result a considerable increase in response rate; for return rate see the result section.

5 Questionnaire

Online questionnaires often lack a high response rate; especially in our case with no direct contact and addressing employees in higher positions. The initial selection of the sample using the not necessarily representative address database inherits already drawbacks regarding generalizability; a low return rate decreases this even further (Mayer 2006). Our benefit is that objective of the survey is about tendencies and

trends and not as much about precise predictions over all areas. The questionnaire has 20 questions of which a respondent would be required to respond to a maximum of 16 and a minimum of 8; five questions are about the enterprise to help the classification of results (see Fig. 1). The average time for answering all questions is between 6 and 10 min. The questionnaire followed general and agreed construction rules; see (Kirschhofer-Bozenhardt and Kaplitza 1986; Schnell et al. 1999).

The survey targets electronic CRM-systems in general and does not encompass any associated CRM-processes, differentiate CRM-systems, or their operationalisation; i.e., as most SMEs often (parts of) use lean systems or even software like Outlook for purposes other than intended. Figure 1 shows the three different paths through the questions; depending on the answer for Q1. We distinguish between SMEs that already have CRM, plan on integrating CRM, or do not intend to use CRM. The SMEs with existing CRM-systems are divided in two further groups: (1) stand-alone CRM-systems; (2) integrated CRM-systems; and (3) office
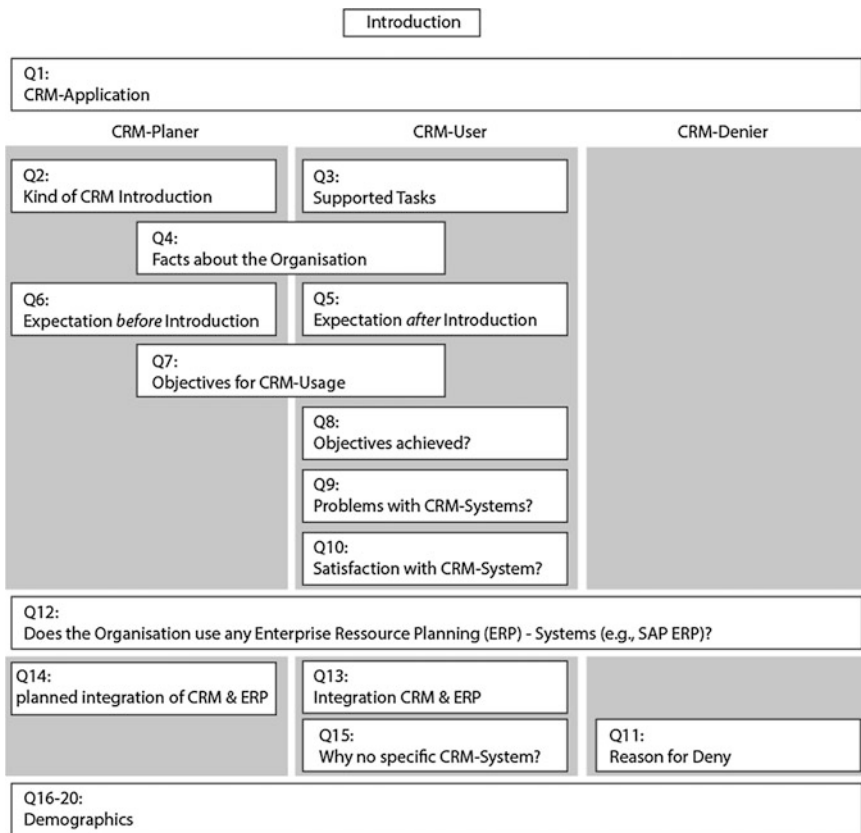

Fig. 1 Structure of the survey. The columns structure the survey with respect to the target groups: CRM-Planer, CRM-User, CRM-Denier. Questions across multiple columns were used for more than one group; whereas the question was modified to match the group

application used for CRM. **CRM-deniers** have the shortest survey as we are only interested in their reasons and demographics data, yet Q11 (and Q15 for the CRM-user) are crucial as they reveal weaknesses of existing CRM-systems. The survey examines if sales manager have awareness of the kind of potential that CRM-systems can have and if the topic is already under investigation; or not. **CRM-planers** are asked about intended and required functionality (Q4) and their expectation on this. Q5 and Q6 are used to verify the main question in this survey (Q7); difference is in how the target group is addressed. **CRM-users** are asked about their implemented and required CRM functionality to verify the degree of coverage. Q8 examines the difference between targeted and actual CRM-system (only items being selected in Q7 are shown). Here, we are interested in targets like customer acquisition, customer loyalty, customer win-back, common information database, cost reduction, and improved effectiveness of processes. We also asked about their impression about competiveness to verify how sale managers see CRM-systems as a tool to improve their opportunities. Q9 is about uncovering problem areas with CRM-systems to suggest solutions. Q12-Q15 are about ERP-systems in general and how well and in which way CRM-systems are already integrated or connected in SME. We expected that either CRM-systems are stand-alone-systems without integration or part of an ERP solution. The survey ends with questions about demographics and the registration via email for the results.

The design of the questionnaire emphasises quantitative results. The main reason for excluding free/open answer fields was to enhance simplicity and make it faster for the sales manager to answer the survey, in an attempt to increase the return rate. Strengthening and verification of discovered information in the quantitative data was achieved by multiple (guided) expert interviews selected from the given sample of enterprises. The interviews were based on the questionnaire, but allowed exploration of other problem areas that we did not foresee. Subjects of the interviews were: (1) information about the enterprise; (2) CRM usage; (3) CRM functions; (4) CRM targets and CRM successes; (5) CRM problems; (6) integration with ERP systems; (7) reasons for not using large stand-alone CRM-systems; (8) general questions.

6 Results

This section summarises the analysis of the answers and their interdependencies. We used a level of significance α of 5 % in case of normal significance and 1 % in case of high significance. Most of the variables in the survey are nominally scaled (non-value categories), the answers *not sure* and *no answer* were not included. The marginal frequency in the contingency table was ≥ 5; in other cases the variable characteristics were combined for the calculation. Furthermore, we analysed subsets on one attribute by taking two characteristics for a comparison with this attribute. Finally, we used in some cases the contingency coefficient Yule's Q for 2×2 cross-classified tables.

6.1 Demographics

We contacted 2,147 enterprises and got a respond from 402 (18.7 %); of which 149 did not proceed further than 20 % into the questionnaire. In total, we had 253 valid replies of which most completed the questionnaire. The question about their customer group had the lowest number of replies with 181 answers (B2B: 55.7 %; B2B/B2C: 28.1 %; no reply: 16.2 %). The geographic distribution in North Germany and their business area is shown in Fig. 2; the sum is larger than 100 as we allowed multiple answers. Figure 3 shows the distribution of employees in the enterprises. With 85.4 % having fewer than 500 employees, we were able to address our intended target group. Despite having more than 500 employees, we still classified the other 14.6 % as SMEs based on other quantitative measures such as appropriate revenue or other qualitative (market reach) criteria.
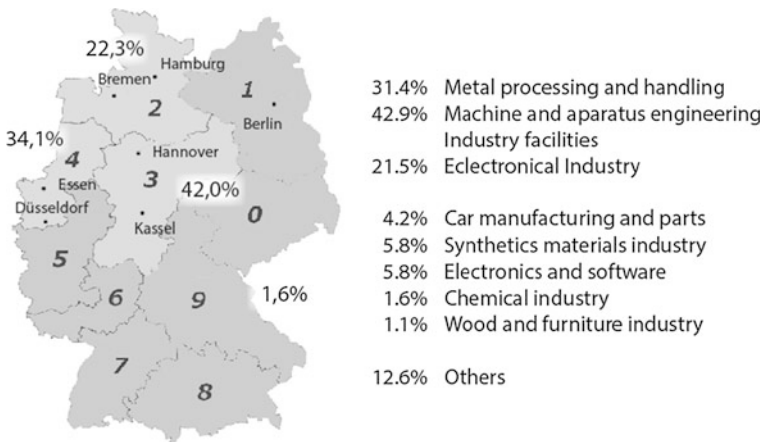

31.4%	Metal processing and handling
42.9%	Machine and aparatus engineering Industry facilities
21.5%	Eclectronical Industry
4.2%	Car manufacturing and parts
5.8%	Synthetics materials industry
5.8%	Electronics and software
1.6%	Chemical industry
1.1%	Wood and furniture industry
12.6%	Others

Fig. 2 Geographic distribution of participating SMEs (191 answers, multiple answers)

Fig. 3 Distribution of employees (191 answers)
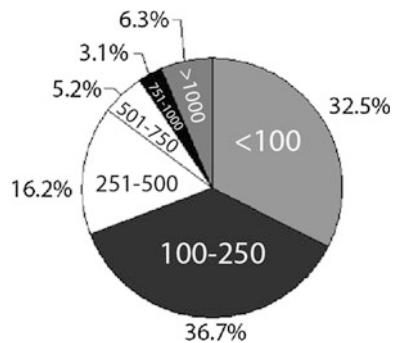
6.2 CRM Usage

Despite the selected target group of SMEs from an industrial area not known to have a strong affinity for CRM-systems, we could observe a relatively high distribution of specialised (25.3 %) and integrated (18.6 %) CRM-systems (Fig. 4). The results also verify our expectation that generic office application functionality is often matched with the CRM requirements (37.6 %). The large number of SMEs not having and not planning on a CRM-system argue that the low distribution is caused by the different needs compared to large enterprise as the number of relations is either to low or not requiring an intensive relation management. CRM-systems would exceed the need; thus a justification for investment in software and training is not given.

The application of CRM-systems in our focus group showed an equal distribution with respect to required functionality and objectives, and does not be affected by the industry area or enterprise attributes like size or revenue.

6.3 CRM Functions

Contact (79.23 %) and master data (63 %) management was, as expected, identified as the core functionality for CRM-systems; however, we would have expected an even higher percentage for the latter one. An explanation might be that a CRM-system-providers origins is CAS (computer aided selling) and not from IT, marketing, or management. In addition, we have to take under consideration, that the participants either did not assume that master data are essential for CRM or that the functionality is implemented in other (ERP) systems and therefore not associated with the CRM-systems. Other functionalities are supported as listed below (Fig. 5):
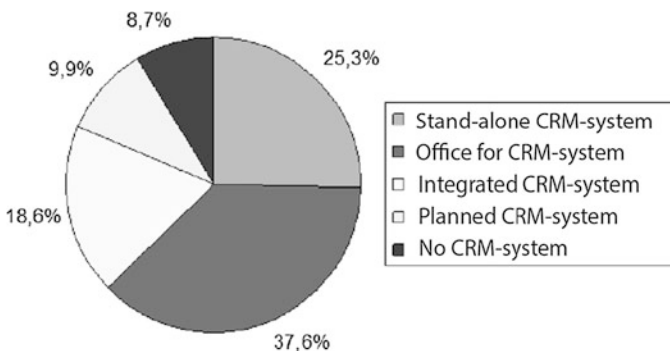

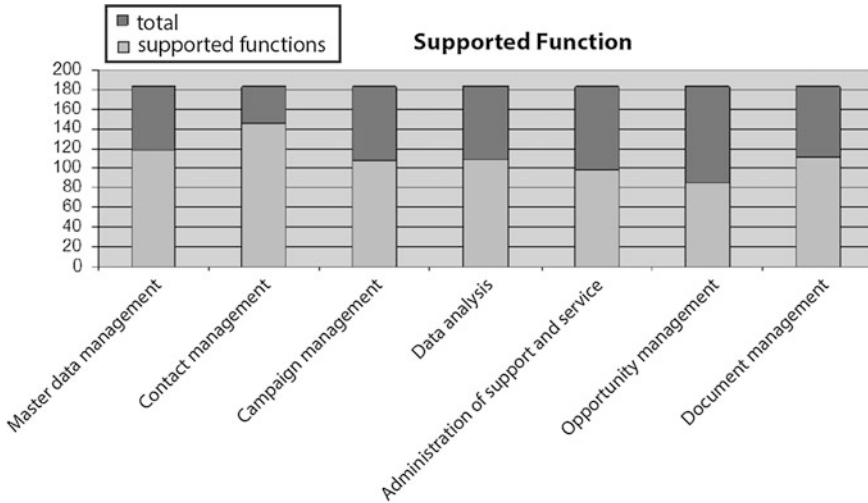**Fig. 4** Distribution of CRM-systems (253 answers)

Fig. 5 Supported function (189 answers, 6 do not known)

- **77.3 %**: Collection and management of customer contacts; including visits, telephone calls, correspondence
- **58.3 %**: Collection and systematic storage of documents linked to customers and activities; including sales, marketing, or service
- **44.8 %**: Administration of potential customers and business opportunities
- **51.9 %**: Documentation of customer complain a well as service and support requests
- **58.2 %**: Data analysis of sales, marketing, and service
- **63.0 %**: Collection and management of customer information and contact details
- **57.1 %** Preparation and submission of circular mail and newsletters

In accordance with other studies (e.g., Torggler 2007), we also found functions like the administration and analysis of master data, contact information, and documents to be most relevant for effective CRM use. These functions are not well-supported by traditional office products used by SME; thus, SMEs using only office products are not achieving the potential benefits of their CRM efforts. The following functionality for CRM was named as important in the survey (see Fig. 6):

- **92.0 %**: Master data management
- **82.1 %**: Contact documentation and management
- **43.3 %**: Campaign mailing and management
- **78.1 %**: Data analysis of sales, marketing and service
- **48.3 %**: Administration of support and service procedures
- **43.3 %**: Lead and opportunity management, new customer management
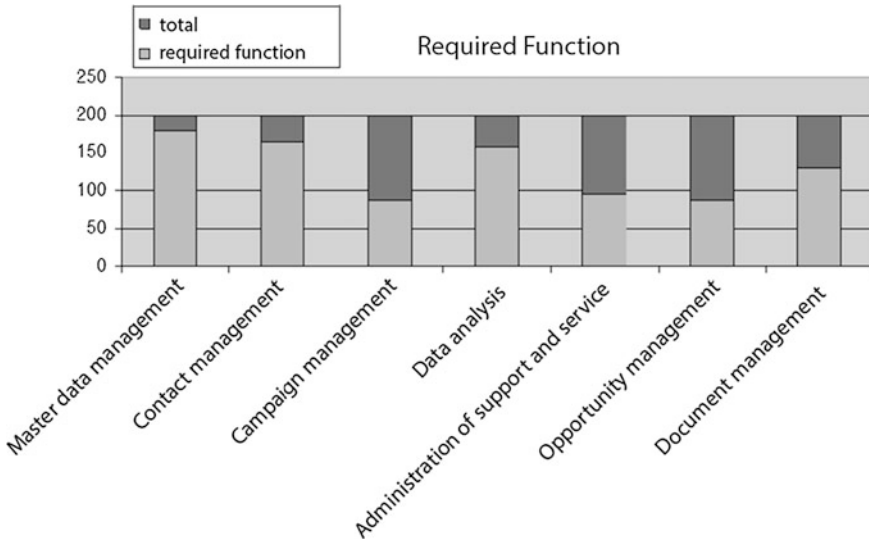- **64.7 %**: Document management in sales, marketing and service

Fig. 6 Required functions (201 answers, 1 do not now; multiple selection)

Using the contingency coefficient Yule's Q, we analysed the overlap between support activities and required functionality to estimate the suitability of used CRM-systems in the SMEs. A third of the participants claimed that besides the administration of contacts they were not sufficiently supported in their activities. One reason might be the implementation of non-market-leading or inapplicable CRM-systems. On the other hand, new CRM-systems are generally future-oriented with functions not currently required or even anticipated by the CRM users.

6.4 CRM-Objectives and Target Achievement

Objectives like cost reduction (72.3 %), creating a central information source (92.0 %), and increasing competitiveness (50.5 %) were often mentioned; even though two answers are not generally associated with CRM-systems as core functionality; see Fig. 7. One reason could be the understanding that, at first, any system is primarily used to support the strategic aims (e.g., survival and growth) and then specialised operational needs in business units; that is customer retention (54.3 %), acquisition (54.3 %), and effective recovery (19.7).

Figure 8 shows that achievement of objectives using CRM is overall assessed positively (Q8); yet SMEs could only achieve minor success in terms of their objectives. The only real exception is the creation of a standardised information source (92.1 %). Noticeable is that all targets were mentioned, on average not statistically significantly more by SMEs with specialised CRM-systems including the achievement of these targets; i.e., cost reduction and improved availability of
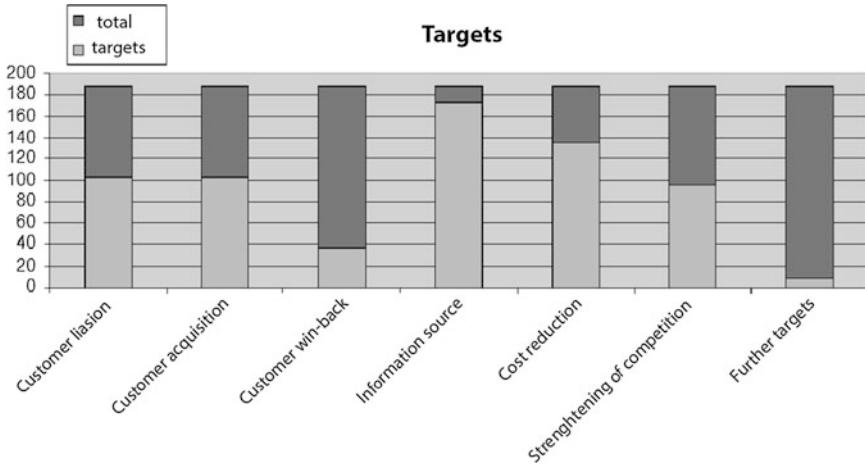
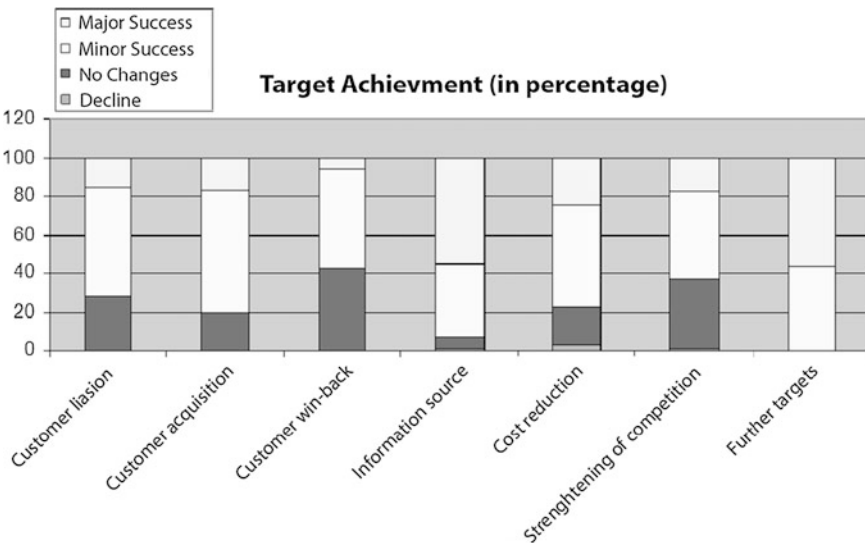**Fig. 7** Targets (188 answers; multiple selections)

Fig. 8 Target achievement (168 answers, percentage)

information. SMEs using Office-systems for CRM-activities mentioned some objectives less frequent and noticed some disadvantages in realising anticipated targets like creating a global information source. SMEs with integrated CRM-systems position themselves in between the specialised systems on the use of office products. The majority of CRM-users are, according to Q10, satisfied or very satisfied (51.5 %); 37.7 % are neutral, 10.8 % are unsatisfied, and no one very unsatisfied (150 valid answers; including 20 abstention from voting); see Fig. 9.

Fig. 9 CRM satisfaction
(150 answers, 20 did not
answer)

Employee satisfaction positively correlates with the availability of specialised CRM-systems (with office products having the lowest value) and the achievement of set targets.

6.5 Problems with CRM-Systems

80.6 % of all sales managers using CRM approaches (systems, integrated, office) mention in Q9, the existence of still unsolved problems. The most often mentioned problem is about the missing system-wide integration of CRM; in especially regarding up-to-date data (40.0 %); followed by employees' acceptance (23.8 %), understanding of CRM and customer focus (22.5 %), missing of features (17.5 %), wasted potential (25.6 %), and no satisfactory metric to evaluate achievement of targets (18.1 %). Again, in SMEs with specialised (26.3 %) or integrated (25.0 %) CRM-systems, users are significantly more satisfied than with office as an alternative (9.7 %). The observation of less integration problems with specialised than integrated CRM-systems contradicts our expectation. Users report that the specialised CRM-systems have a higher homogeneity rate in the enterprise-wide data than integrated systems. This result is important to follow-up in further investigations as it raises concerns either about the systems itself or the awareness of the users using the specialised systems regarding the quality of the data.

6.6 CRM Integration in ERP-Systems

Figure 10 visualises how SME integrate their CRM functionality with existing ERP systems; if available (58.9 %). As expected, the use of CRM-systems correlates with the availability of ERP-systems.

Here, the ERP-system usage correlates significantly with the CRM-system deployment. Companies with ERP-systems have more frequent, integrated,
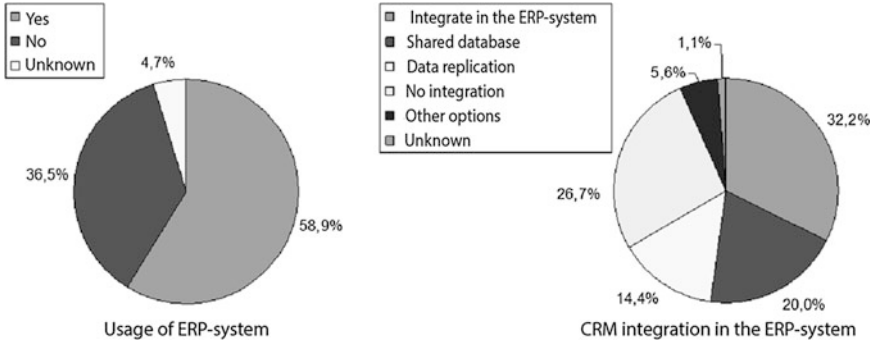
Fig. 10 ERP usage (192 answers) and CRM-integration in ERP-system (90 answers)

CRM-systems in use. Our assumption, that larger SMEs are more likely to have ERP-systems implemented, could not be confirmed within this study. The proportion of ERP-systems is similar both in SME with less than 100 employees and with more than 250 employees. This phenomena was further investigated in the expert interviews where all agreed on the same two arguments that make ERP-systems absolute essential: (1) the complexity of processes is unrelated to the size of an enterprise; and, (2) enterprises are 'forced' into certain data and process standards by larger companies and corporations to allow and secure contracts and collaboration.

Despite the usage of ERP-systems, it is remarkable that over 30 % still do not integrate their CRM approach (26.7 % no integration; 5.6 % other exchange like printed documents). Only 34.4 % integrate their CRM-system by either having a shared master database (20.0 %) or replicate the data in defined time intervals (14.4 %). 32.2 % do not use a stand-alone CRM-system but use the integrated ERP-functionality for this purpose; this could be most often observed with smaller SME who try to minimise their IT overhead. In case of shared master data, the storage and administration is generally associated with the ERP-system to reduce the complexity of distributed databases. Table 1 matches integration method with anticipated results. Similar to the observation reported in Section "Problems with CRM-systems", it is surprising that a full integration of both systems is regarded less effective than replication or shared data bases (1.38 vs. 1.25/1.33 [persistent database]; 1.95 vs. 1.67/1.75 [cost reduction, efficient work]; lower value better). The expert interviews indicate that this is most likely related to the users' failure to fully understand the technology and require specialised training.

Table 1 Matching integration method with anticipated results, lower values are better)

Integration method/targets	Full integration	Shared database	Replication	No integration
Persistent database	1.38	1.33	1.25	1.81
Cost reduction/efficient work	1.95	1.75	1.67	2.31

6.7 Future Integration of CRM-Systems

The small group of SME without and not planned CRM-systems indicate that they do not require these systems (38.9 %), is not yet considered (38.9 %), or found different approaches to compensate the functionality. Only one SME argued with the low cost-benefit-ratio (5.6 %), overall cost was not used as an argument at all (0.0 %). Further reasons for not having CRM are political (5.6 %) or strategic reasons (11.2 %), or expected problems of integrating the CRM into the given IT landscape (22.4 %). In our study, the number of SME without CRM was with 19 participants (and one not answering this question) relatively low; such further studies are required to investigate reasons for missing CRM support and how to approach technical and political problems (Figs. 11, 12).

If we look at the SME group using office products for their CRM, we can observe different tendencies for the future. 29.3 % are satisfied with their current solution, while 32.8 % intend to migrate to a full CRM-system (integrated in ERP and stand-alone). The other SME currently do not consider other systems (18.0 %) as the use alternative methods for customer retention (9.8 %), fear the cost (11.5 %), expect an unsatisfying cost-benefit-ratio (9.8 %), or expect problems during the IT-integration (19.7 %).

6.8 Integration of CRM/Expert Interviews

All three groups from the survey share one common problem: integration. Integration prevents over 20 % of non CRM-users initiating projects and over 25 % of
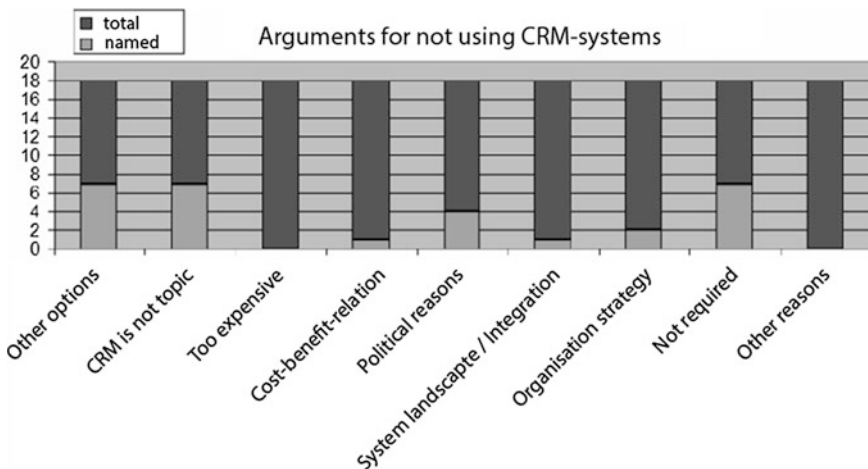

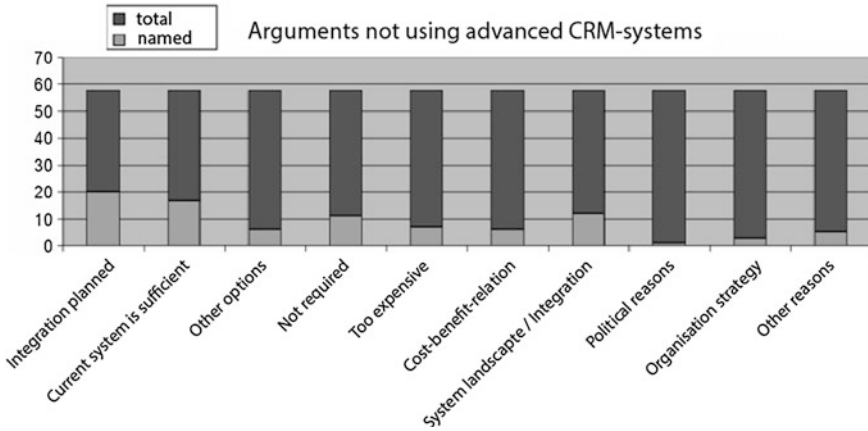**Fig. 11** Arguments for not using CRM (19 answers, 1 do not know)

Fig. 12 Argument for not using advanced CRM-systems (61 answers, 3 do not know)

CRM-system owners, either special or integrated in ERP, mention problems or need for improvements. One of the major reasons stated during the expert interview is about the complexity of these systems. In comparison to larger enterprise, SMEs often do not have the capacity, knowledge, or financial opportunities for consultants. In addition, most CRM-systems offer a functionality that goes far beyond the need of most SMEs; CRM-Lite systems are often sufficient but lack the acceptance of SMEs and larger enterprises.

The experts stated without doubt that the relationships with customers are essential for enterprises, independent of factors such as industrial area, size, revenue, integration in supply chains, or location. The changes in communication technology, the success of social networks, and the immediate availability of information allows customers to be informed about the market and the competition. Customer retention becomes crucial as costs relating to marketing and winning the customer back exceed the budget of most SMEs in the long run. The invited experts are from different areas, but operate in markets with similar characteristics: strong competition; i.e., with global enterprises. Still, many of the SMEs retain global market leadership through technological innovation, flexibility, and addressing market niches. Their success is the close relation to customers to explore individual solutions and adapt products to given requirements rather than expecting customers to change. We expected to find a far more advanced integration of CRM-systems in SMEs. The responsible sales managers are aware of the importance of integrating CRM-systems in their companies, yet have to deal with grown structures, traditional methods to keep records and manage customers, as well as the focus on the core business. Compared to large enterprise, the SMEs do not have the resources, financial and human, to initiate large IT projects and have to find solutions that are simple to implement and use, do not interfere with the operational business, and match with the needs of their business (purpose not functionality decides about success). The experts emphasised that it is important to

add functionality in an iterative step-by-step process rather than a complex system at once. The acceptance and willingness of employees towards changes in the software and the processes is crucial and easier to achieve if the complexity and the amount of redundant training is kept low.

The use of office systems seems to be an adequate tool to manage customer relations in a first cost-effective step to a more profound solation. Employees do not require basic training, the structures in SMEs often allow data management on local systems, and it can be adapted to a certain extent. Nevertheless, the survey showed that SME are aware of future changes and that they have to define a path to integrate CRM. Up-to-date, specific CRM-systems, still dominate integrated systems, but according to the survey SME intend to migrate to integrated systems; especially smaller enterprises as they need to keep the administrative overhead down.

The survey revealed some unexpected results. Integration problems were mentioned more often with integrated CRM-systems; same is said about the satisfaction with the systems and achieving the defined targets. Even the homogeneity of data and reduction in cost, two factors we would have expected the benefit with the integrated systems, were more often selected of specific CRM-systems. One expert pointed out that the success of the stand-alone CRM-systems result from their specialisation. Fully integrated systems often have weaknesses like acceptance, flexibility, functionality and connectivity to in-house systems and, therefore, do not allow 100 % integration in the enterprise.

The experts place a higher importance on customer retention than the survey suggested. The results in the survey reflect the current status-quo of opportunities to actively provide a successful management and retention of customers; as most SME do not have the required availability of information and an enterprise-wide database to synchronise actions. Customer retention is the long-term objective, the creation of a centralised database the path to achieve this.

The expert interviews covered further technical-organisational problems; e.g., the sensible quantity of data employees can collect, difficulties in objectives regarding CRM-projects, missing support from executives, limited resources, and definition of expected features for the CRM-system. Besides integrated systems (e.g., offered by SAP), all agreed that so-called CRM-light or CRM-lite solutions are an interesting alternative as they provide core functionalities without disadvantages like overhead, costs, and extensive training needs; see also (Sulewski and Höliner 2004).

7 Conclusion

The survey took a snapshot of small- and medium-sized enterprise in the Northwest region of Germany, focusing on how they are currently integrating CRM functionality in their IT landscape. The outcome of the survey was analysed and the validity was increased by discussing unexpected outcomes with four experts from different industrial sectors than those surveyed. For example, the survey showed

a favour for stand-alone systems with respect to features that are more common with fully integrated systems. We agree with the experts that this results from the organisational structure, the immediate requirements for a CRM-system, the lack of resources for IT experts, acceptance, and integrated systems not matching the needs. Based on the survey, only small enterprises with limited needs for CRM functionality use integrated CRM-systems as the functionality comes with the ERP-system and can generally implemented with basic customisation.

The specification of a CRM-system for SME is substantially different from CRM-systems for large enterprises. Employees in SME often have a higher workload; any extra time-consuming workload like entering additional data into systems, operating complex systems, or integrating new technology into their processes has to be balanced with substantial benefits. In addition, SME operate differently in highly competitive markets as they use their flexibility to find market niches. The day-to-day business in SME has priority over any other project; thus the implementation of CRM-systems has to follow different rules than it would be in larger enterprises. One of the experts mentioned that CRM-systems "are not allowed to become our biggest project; our biggest project is always the customer".

8 Questionnaire

Welcome to the survey about Customer Relationship Management Systems in small- and medium-sized businesses![1]

Customer Relationship Management (CRM) systems are electronic systems, which are used systematically by organisations during the process of customer retention as well as creating sustainable customer relationships. CRM-systems administrate different types of information, which can be used to address customer needs much more precisely and therefore reach a higher level of customer satisfaction. Examples for typical CRM functions are the administration of contacts, lead- and opportunity management, servicing, sales management and customer analysis.

Question 1: Which electronic system is your first choice regarding administration of customer relations and sale opportunities (CRM)?
[only single choice][mandatory question]
(CRM-usage)

- We use a special CRM-system (electronic system for administration of customer relations)
- We just use office and mailing applications (e.g., Microsoft Outlook and Office) for managing typical CRM tasks

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[1] The given brackets specify type of question [] and variables for controlling the path through the survey ().

- We use CRM-functions, which are part of an extensive system; e.g., Enterprise Resource Planning (ERP) System
- We do not use an electronic system for managing typical CRM-tasks, but have plans about an implementation
- We do not use an electronic system for managing typical CRM-tasks and do not plan the implementation of these systems

Question 2: In case you are planning an implementation: What kind of CRM-system will be presumably implemented in your company?
[only single choice]
(CRM-planning)

- A specific CRM-system
- We are planning on extending the use of office and mailing programs or an extension for CRM-usage
- We will be implementing or extending a system (e.g., ERP-system) which will be used for CRM-tasks
- Not yet decided

Question 3: In which tasks do you benefit from your current CRM-system?
[multiple choices possible]
(only for CRM-users)

- Collection and administration of customer contacts (e.g., visits, communication) *(supports: contact administration)* [1]
- Collection and systematic organisation of customer and customer process documents regarding sales management, marketing and service *(supports: document management)* [2]
- Administration of business opportunities or leads as well as potential customers *(supports: opportunity-management)* [3]
- Documentation of customer complaints, service and support *(supports: service functions)* [4]
- Evaluation of sales, marketing and service data regarding different aspects *(supports: evaluation)* [5]
- Collection and administration of versatile information regarding customers and contact persons *(supports: master data)* [6]
- Preparation, dissemination and analysis of circular letters/mailings *(supports: campaign management)* [7]
- Not sure about it

Question 4: Which are the essential functions for your company (regardless of your currently used or planned system)?
[multiple choices possible]
(only for CRM-users or CRM-planners)

- Customer base and address administration to extract detailed customer and contact information *(requires: base data)* [6]

- Contact administration and history (e.g., regarding visits, phone calls) *(requires: contact administration)* [1]
- Campaign management and mailings *(requires: campaign management)* [7]
- Evaluation and analysis within sales management, marketing and service *(requires: analysis)* [5]
- Administration of information within support and servicing *(requires: service functions)* [4]
- Lead and opportunity management, interested parties *(requires: opportunity management)* [3]
- Document management within sale management, marketing and servicing *(requires: document management)* [2]
- Not sure about it

Question 5: Which benefit did you expect for your company from the implementation of your CRM-system?
[multiple choices possible]
(only for CRM-users)

- To improve customer loyalty and tie them stronger to your company/strengthening the bond between customer and company *(control: customer loyalty)* [A]
- To prevent scattering of information or expert with intrinsic knowledge *(control: information source)* [D]
- Advanced administration of leads/interested parties; to win them easier as customer *(control: customer acquisition)* [B]
- To strengthen or extend our market position by the improvement of customer relations administration *(control: competition)* [F]
- Improved opportunities of regaining lost customers/customer win-back *(control: customer win-back)* [C]
- Our CRM-system simplifies work and therefore leads to time and cost reduction *(control: cost reduction)* [E]
- Not sure about it

Question 6: Which benefit do you expect from the future implementation of a planned CRM-system for your company?
[multiple choices possible]
(only for CRM-planners)

- To improve customer loyalty and tie them stronger to your company *(control: customer loyalty)* [A]
- To prevent scattering of information or expert with intrinsic knowledge *(control: information source)* [D]
- Advanced administration of leads/interested parties; to win them easier as customer (control: customer acquisition) [B]
- To strengthen or extend our market position by the improvement of customer relations administration *(control: competition)* [F]

- Our CRM-system simplifies work and therefore leads to time and cost reduction *(control: cost reduction)* [E]
- Not sure about it

Question 7: What are the most important business objectives and strategies of customer retention, which you pursue by using a CRM-system?
[multiple choices possible][mandatory question]
(only for CRM-user and CRM-planers)

- strengthening customer loyalty *(customer loyalty)* [A]
- improving customer acquisition *(customer acquisition)* [B]
- improving customer win-back *(customer win-back)* [C]
- centralised source of information *(source of information)* [D]
- cost reduction and more efficient work *(cost reduction)* [E]
- improve competitive advantage *(competitive advantage)* [F]
- others

Question 8: To what extent did you achieve your aims?
[matrix-question– per aim no multiple choice]
(only for CRM-users, only before mentioned items are shown)

- considerable success
- light success
- no changes
- degradation
- no information about this

Question 9: In which areas did you observe difficulties using your CRM-system?
[multiple choices possible]
(only for CRM-users)

- We did not experience any problems with our CRM-system (problem: no problems)
- low acceptance by users *(problem: acceptance)*
- lack of essential functionalities *(problem: missing functions)*
- many unused functions waste potential *(problem: unused functions)*
- different data sources or systems are not sufficiently connected within our company *(problem: integration)*
- low comprehension of CRM and customer centrification within the company degrade the benefit *(problem: low comprehension)*
- no satisfactory solution how to measure CRM achievements *(problem: measuring)*
- others: [+ text field]
- not sure about it

Question 10: How satisfied are you with your CRM-system?
[single choice only]
(only CRM-users, CRM-satisfaction):

- very satisfied—the concept of customer centrification is full success within our company
- satisfied—with our CRM-system we were able to achieve our essential goals
- neither very satisfied nor unsatisfied
- unsatisfied—many things did not work out as expected
- very unsatisfied—investing in this system was a failure
- no opinion

Question 11: What are the reasons that keep you from implementing an electronic CRM-system in your company?
[multiple choices possible]
(only CRM-deniers)

- so far CRM was not under consideration for us *(denial: no consideration)*
- CRM-systems are too expensive for us
- We currently use other means to enhance customer satisfaction and loyalty [+ text field] *(denial: other means)*
- *(denial: too expensive)*
- CRM-systems do not give us a satisfying cost-benefit ratio *(denial: cost-benefit ratio)*
- reasons are based on our system e.g., difficulties to integrate within existing IT *(denial: integration)*
- political reasons *(denial: politics)*
- reasons are based on our enterprise strategies *(denial: strategy)*
- we do not need such a system, because …..[+ text field] *(denial: no need)*
- other reasons: [+ text field]
- not sure about it

Question 12: Is your company currently using an Enterprise Resource Planning (ERP) - System (e.g., SAP, ERP)?
[only single choice]

- Yes
- No
- Not sure about it

Question 13 (ERP-CRM-integration): How did manage to share data between ERP- and CRM-system?
[only single choice]
(only for CRM-users, who use ERP-system (question12))

- we use a shared database for both systems

- Our CRM-system is part of the ERP-system, therefore no need to integrate anything
- we use data replication/redundant data management and frequent data synchronisation
- Both systems are not linked
- Other options of integration: [+ Textfeld]
- Not sure about it

Question 14: How do you plan to manage the integration of data between ERP- and CRM-system?
[only single choice]
(only CRM-planners and users of ERP-systems (question 12))

- The CRM-system will be part of the ERP-system, therefore no need of integration
- we will use a shared database for both systems
- we will use data replication/redundant data management and frequent data synchronisation
- Both systems are not linked
- Other options of integration: [+ Textfeld]
- Not yet decided on

Question 15: What are the reasons for your company not to use an advanced/ specialised CRM-system?
[multiple choice possible]
(only CRM-users, who currently use office and other mailing systems (question 1))

- We plan to implement an advanced system (Office: system is planned)
- Currently used system fulfils our needs (Office: needs fulfilled)
- Not necessary, because we have other means to improve customer loyalty and satisfaction [+ text field] (Office: other means)
- Such systems are not yet under consideration *(Office: no consideration)*
- Advanced CRM-systems are too expensive for us (Office: too expensive)
- Advanced CRM-systems do not offer a satisfying cost-benefit ratio *(Office: cost-benefit ratio)*
- Reasons are based on our system e.g., difficulties to integrate within existing it *(Office: integration)*
- political reasons *(Office: politics)*
- reasons are based on our enterprise strategies *(Office: strategy)*
- we do not need such a system, because… [+ text field] *(Office: no need)*
- other reasons: [+ text field]
- not sure about it

Question 16: **In which field is your company operating?**
[only single choice]

- Business-to-Business (B2B)
- Business-to-Customer (B2C)
- both—B2B as well as B2C

Question 17 [mandatory question]: In which of the following fields is your company operating?
[multiple choice possible]

- Metal working and processing (Metal)
- Machine- and apparatus engineering, industrial facilities (Machines)
- Electronics, electro-technical industry
- (Electronics)
- Vehicles e.g., vehicles construction, vehicles parts (Vehicles)
- Synthetic material or goods, (Synthetic)
- Electronic engineering, software (Electronic)
- Chemical industry (Chemistry)
- Wood- and furniture industry
- (wood/furniture)
- others: [+ text field]

Question 18: How many employees work in your company?
[only single choice][mandatory question]

- less than 100
- 100–250
- 251–500
- 501–750
- 751–1,000
- over 1,000
- not sure about it

Question 19 (total revenue): How was the total revenue of your company within the last business year?
[only single choice]

- less than 10 Million
- 10–25 Million
- 26–50 Million
- 51–75 Million
- 76–100 Million
- more than 100 Million
- no information
- not sure about it

Question 20 (zip-code): Where is your company/main office located? (pick the first number of your zip-code.)
[only single choice]

- zip-code area 2
- zip-code area 3
- zip-code area 4
- in a different zip-code area : [+ text field]

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