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Analysis of Customer Relationship Management Needs in a B2B Pharmaceutical Company

Andreza Vaniria Benchimol Domingues

Master in Management of Services and Technology

Supervisor:
PhD, Susana Isabel dos Santos Ratinho, Invited Assistant Professor,
Iscte-IUL

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BUSINESS
SCHOOL

Department of Marketing, Operations and General Management

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Resumo

Este estudo aborda os desafios enfrentados por uma empresa farmacêutica Business-to-Business (B2B) devido à centralização ineficaz da informação e à fragmentação de dados em múltiplas fontes, que dificultam o acompanhamento das interações com os clientes. A ausência de um sistema integrado de Customer Relationship Management (CRM) compromete a capacidade da empresa em obter uma visão completa das relações e em otimizar os processos de atendimento.

O objetivo principal desta investigação foi identificar e analisar as necessidades essenciais para a futura implementação de um CRM no contexto B2B. Os objetivos específicos centraram-se em: (i) identificar necessidades associadas ao acesso e consulta das interações; (ii) analisar a necessidade de uma visão integrada de 360° do cliente; (iii) examinar necessidades ligadas à eficiência dos processos e à redução do tempo de procura de informação; e (iv) avaliar necessidades relacionadas com o acompanhamento de KPIs.

Foi realizado um estudo de caso único, de caráter exploratório e abordagem qualitativa. A recolha de dados incluiu entrevistas com gestores, observação durante um estágio de um ano e a análise de um inquérito de satisfação de clientes. A análise de conteúdo permitiu identificar seis necessidades principais: centralização da informação, automatização de processos, histórico de interações, formalização de processos, gestão de alertas e monitorização de desempenho.

Conclui-se que as necessidades identificadas apontam para a pertinência de um CRM ajustado à gestão de clientes B2B, capaz de otimizar processos, aumentar a satisfação dos clientes e fortalecer a posição competitiva no setor farmacêutico.

Palavras-chave: Customer Relationship Management (CRM); Setor farmacêutico; Business-to-Business (B2B); Estudo de caso; Necessidades.

Abstract

This study addresses the challenges faced by a Business-to-Business (B2B) pharmaceutical company due to the ineffective centralization of information and the fragmentation of data across multiple sources, which hinder the monitoring of customer interactions. The absence of an integrated Customer Relationship Management (CRM) system compromises the company's ability to obtain a complete view of customer relationships and to optimize service processes.

The main objective of this research was to identify and analyze the essential needs for the future implementation of a CRM system in a B2B context. The specific objectives focused on: (i) identifying needs related to access and consultation of customer interactions; (ii) analyzing the need for an integrated 360° customer view; (iii) examining needs associated with process efficiency and reduced search time; and (iv) assessing needs related to KPI monitoring.

A single exploratory case study with a qualitative approach was conducted. Data collection included interviews with managers, direct observation during a one-year internship, and the analysis of a customer satisfaction survey. Content analysis identified six main needs: information centralization, process automation, interaction history, process formalization, alert management, and performance monitoring.

It is concluded that the identified needs highlight the relevance of a CRM tailored to B2B customer relationship management, capable of optimizing processes, increasing customer satisfaction, and strengthening the company's competitive position in the pharmaceutical sector.

Keywords: Customer Relationship Management (CRM); Pharmaceutical sector; Business-to-Business (B2B); Case study; Needs.

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Glossary of Acronyms

CRM - Customer Relationship Management

ERP - Enterprise Resource Planning

KPI(s) - Key Performance Indicator(s)

EXW - Ex Works

ATWs - Packaging artworks

ROI - Return on Investment

SAP - System Applications and Products in Data Processing

CLV - Customer Lifetime Value

NPS - Net Promoter Score

EFA - Exploratory Factor Analysis

SEM - Structural Equation Modeling

SOPs - Standard Operating Procedures

IT - Information Technology

SAC (Serviço de Apoio ao Cliente) - Portuguese acronym for Customer Support department.

B2B - Business to Business

Glossary of Concepts

EXW (Ex Works) – Incoterm meaning the seller makes goods available at their premises; the buyer assumes all costs and risks of transport.

ATW (Artworks) – Graphic materials such as packaging designs, labels, and leaflets used in the pharmaceutical industry to ensure correct product presentation and regulatory compliance.

Data Loggers – Electronic devices that record environmental data (e.g., temperature, humidity) during storage and transport of goods.

1. Introduction

This chapter presents the context of the study, describing the company under analysis, the main objective and specific objectives, as well as the research questions that will be answered throughout the work. In addition, it highlights the methodology adopted and the general structure of the study, in order to guide the reader through the development of the following chapters.

1.1 Context

Effective information management and customer monitoring are essential for companies seeking competitiveness and efficiency, especially in dynamic markets such as the pharmaceutical industry. In this context, organizations need robust systems to ensure accuracy in operations and agility in decision-making. Technologies such as Customer Relationship Management (CRM) and Enterprise Resource Planning (ERP) systems play key roles in this process. ERP solutions, by integrating organizational processes through shared databases and standardized workflows, enhance efficiency, reduce cycle times, simplify documentation, eliminate errors, and consolidate processes (Butarbutar & Soesilo, 2023). CRM, in turn, as noted by Maaitah (2023), strengthens customer relationships, allowing for an integrated view of each customer and more targeted and personalized actions.

The company under study operates in a B2B model, supplying medicines to other companies in the pharmaceutical sector. These companies, which are its direct customers, use the products purchased to meet market demand, whether for distribution, marketing, or other purposes related to the healthcare sector. Managing interactions with these corporate customers is therefore a strategic issue for the company, as production and supply decisions are complex and require close and constant monitoring.

Currently, the company faces challenges due to the ineffective centralization of information and fragmentation of data, which hinder the efficient tracking of interactions with customers. The absence of an integrated CRM system compromises the entity's ability to obtain a complete and accurate view of the history of interactions, which would allow for the optimization of customer service processes. This study aims to identify and analyze the essential needs for the

future implementation of a CRM system in a B2B context, providing guidance to ensure that the system responds to the company's customer relationship management challenges.

As highlighted by Jiang (2009), "the integration of CRM and ERP not only solves the problems of fragmented information but also improves the company's ability to respond more quickly and accurately to customer and market needs" (p. 2). According to Padhy and Patnaik (2008), the implementation of a CRM system, especially in industries such as pharmaceuticals, not only improves customer interactions and their monitoring, but also allows companies to optimize product launches, defend brand strategies, manage product life cycles, and strengthen relationships with key customers. This results in a significant competitive advantage by ensuring that these customers remain out of reach of competitors, allowing the company to position itself more effectively in the face of market changes.

The case study will be conducted in the Customer Support department, known internally as SAC (Serviço de Apoio ao Cliente), which is responsible for managing orders, inquiries, and delivery times for corporate customers. The study focuses on identifying the needs that emerge in customer relationship management, as a foundation for a future CRM implementation capable of consolidating these needs, improving organizational performance, and optimizing service and communication with B2B customers.

1.2 Definition of Objectives

The definition of the objectives of this study is fundamental to guide the entire research process. It is through these objectives that we clearly establish the goals to be achieved, as well as delimit the expected contribution of the study. In this regard, the main and specific objectives are presented below:

Main Objective:

To identify and analyze the essential needs for the future implementation of a Customer Relationship Management (CRM) system in a B2B context, supporting the centralization of customer interactions and the optimization of service processes.

Specific Objectives:

- Identifying needs related to access and consultation of customer interactions.
- Analyzing the need for an integrated 360° customer view.
- Examining needs associated with process efficiency and reduced search time.
- Assessing needs related to KPI monitoring in customer management.

1.3 Research Questions

Considering the problem statement and objectives presented, this study aims to address the following research questions:

- What are the essential needs for the future implementation of a CRM system in the B2B company under study?
- How can the identification of these needs contribute to improving B2B customer relationship management?

1.4 Methodology

The methodological strategy adopted was a single-case study, exploratory and qualitative in nature, as it was appropriate for the objective of assessing needs for the creation of a CRM system in a specific organization (Yin, 2013). This methodology allows for an in-depth and contextualized understanding of the processes and practices of the SAC department of the B2B pharmaceutical company under analysis, making it possible to answer the research questions formulated.

The unit of analysis is the SAC department. Data collection combined multiple sources: (i) semi-structured interviews with four managers and the logistics director; (ii) direct and participant observation over a twelve-month internship; (iii) internal documentation (SAP, reports, and manuals); and (iv) results of the annual satisfaction survey sent to 28 customers (19 responses). This triangulation reinforces the validity of the construction by cross-referencing perspectives and evidence from different methods.

Data analysis followed content analysis procedures (Bardin, 2020), involving pre-analysis, coding, and categorization of the units of record, culminating in the treatment and interpretation

of the results. The needs that emerged: management and centralization of information; process automation; interaction history; process formalization; alert and reminder management; monitoring and access to indicators, structure the reading of the findings and support the formulation of the identified needs. To ensure reliability and traceability, a systematic record of analytical procedures and decisions was maintained, ensuring consistency between objectives, research questions, and empirical evidence.

1.5 Structure of the Study

This study is organized into six chapters, structured as follows:

- Chapter 1 – Introduction: contextualizes the study, presenting the research objectives, research questions, and methodology adopted.
- Chapter 2 – Literature Review: brings together the theoretical framework, exploring concepts, models, and practical cases of CRM, in order to understand how the topic has been addressed by other authors and identify existing gaps.
- Chapter 3 – Methodology: describes the research strategy and methods used for data collection, processing, and analysis.
- Chapter 4 – Results: presents the main findings obtained from interviews, observation, documentation, and satisfaction survey, reflecting the reality of the company under study.
- Chapter 5 – Discussion: critically analyzes the results, highlighting convergences and divergences between empirical data and existing literature.
- Chapter 6 – Conclusions and Recommendations: summarizes the main conclusions, highlights the limitations of the study, and presents recommendations for the future implementation of a CRM system, as well as suggestions for further research.

This structure allows the study to be organized and unfolded in a logical and progressive manner, ensuring the connection between each stage of the research and providing a clear view of the path followed.

2. Literature Review

This literature review chapter presents the theoretical foundations that support the proposed solution. It begins with the definition of the concept of CRM and its evolution over time, then moves on to the different types of CRM, the associated processes, and their importance in the B2B context. Next, implementation methodologies are discussed, and finally, practical cases are analyzed.

This survey allowed to integrate relevant theoretical contributions on the functioning of CRM systems, while the practical cases enabled us to reflect on how theory relates to practice and how it is applied in different organizations. The objective of this review is, therefore, to build a solid framework that allows us to understand how the various elements interconnect and support the research developed.

2.1 Concept and Evolution of CRM

The CRM is widely recognized as a customer-centric business philosophy that emphasizes the development and maintenance of long-term relationships through the use of information and communication technologies (Grabner-Kraeuter et al., 2007). Payne and Frow (2005) define CRM as a multifunctional strategic approach aimed at increasing shareholder value through the establishment of appropriate relationships with key customers and specific market segments. They also highlight that CRM integrates multiple organizational functions in order to optimize the management of customer data and interactions.

The evolution of CRM reflects a shift in companies from a purely transactional perspective toward a relational strategy. According to Payne and Frow (2005), CRM can be categorized into four main levels:

- Product-based selling: A product-focused approach with minimal personalization and limited data collection;
- Managed service and support: Personalized service through call centers with a stronger customer focus;
- Customer-oriented marketing: Commercial strategies adapted to customer needs, albeit without full personalization;
- Individualized CRM: Data and technology integration to deliver highly personalized services.

In addition to its strategic role, Lipiäinen (2015) notes that within the B2B context, CRM is not only a technological solution that supports customer-related processes but also a fundamental operational model that places customers at the core of business activities. In a study conducted across three B2B companies, Lipiäinen observed that smaller organizations were more customer-oriented, while larger ones tended to maintain a product-focused approach. The study also revealed that companies utilized CRM to document meeting notes, relevant emails, and client visit reports, thereby constructing an integrated view of each customer and anticipating future developments in the business relationship.

2.1.1 Types of CRM

Greenberg and Signori (2002) identify three primary types of CRM:

- Operational CRM: Refers to customer-facing applications, such as sales force automation, enterprise marketing, and customer service. This type allows for the integration of various tools to enhance data management and customer interactions.

- Analytical CRM: Focuses on data storage and processing, enabling organizations to interpret and extract valuable insights from customer information. Its primary advantage lies in the capacity for personalization and the strategic use of these insights.

- Collaborative CRM: Facilitates communication and integration among different customer touchpoints, promoting effective interaction between consumers and distribution channels.

2.1.2 CRM Processes

As Rababah et al. (2011) emphasize, it is essential for companies to understand these different CRM types and the processes involved before implementing any system to ensure successful adoption. CRM processes can be categorized across several levels, each contributing to the effectiveness of customer relationship strategies:

- Customer-facing level CRM processes: These encompass the direct management of customer relationships, divided into three stages:
    - Initiation: Identification of potential customers and new business opportunities;

    - Maintenance: Includes sales activities, customer retention programs, and regular interactions;

    - Termination: Activities related to ending the customer relationship, which may occur at any stage of the customer lifecycle;
- Customer-oriented CRM processes: Activities aimed at satisfying customer needs and solving specific problems efficiently.
- Cross-functional CRM processes: Strategic processes related to value creation, information management, and performance evaluation across departments.
- CRM macro-level processes: Strategic activities designed to strengthen customer relationships and maximize overall profitability.

As Rababah et al. (2011) state:

"The understanding of the expected benefits of the CRM program and the enabling of the organization to measure the influence and implication on the organizational performance of the CRM program are other two important dimensions of the benefits of understanding CRM processes. Hence, understanding these processes will help the organization to plan well for the implementation of CRM program/systems" (p. 26).

In this sense, a comprehensive understanding of CRM processes allows companies to better plan implementation efforts, ensuring that expected outcomes are achieved and measurable within the context of organizational performance.

2.1.3 Importance of CRM in the B2B Context

In B2B environments, CRM holds even greater relevance, as it manages long-term commercial relationships where personalization and detailed customer interaction management are vital.

Molnár et al. (2021) underscore the significance of CRM in B2B organizations, asserting that in a highly competitive market, it is crucial to understand customers more deeply and use this knowledge strategically to improve performance and Return on Investment (ROI). Among the key benefits of CRM in the B2B context are:

- Contact management: As the customer base expands, there is a growing need for sophisticated data management software to store and record information, which can then be used in customer-focused processes.
- Problem resolution and analytical insights: In the B2B sector, CRM facilitates tailored responses to corporate clients by automating routine tasks and reducing reliance on sales staff for data organization. This leads to improved visibility of contacts, leads, inventory, pricing, transactions, and ongoing activities.
- Profitability management: CRM allows for detailed profit tracking by channeling resources toward higher-margin clients. This has a direct impact on customer satisfaction and encourages long-term loyalty.
- Competitive advantage: By integrating CRM into the organizational structure, companies improve customer understanding, optimize marketing strategies, reduce the time spent by sales teams, and minimize communication issues between departments. Additionally, the increasing competition in B2B markets demands enhanced services and faster response times, making CRM an indispensable tool for operational efficiency.

2.1.4 Implementation Methodologies

Several studies in the literature point to the need for a structured and strategic approach to the implementation of CRM systems. A relevant example is the work of Chalmeta (2006), who proposes a comprehensive methodology developed based on the collaboration of several companies. The central objective of the proposal is to ensure that the CRM adoption process is aligned with the organizational strategy, promoting concrete improvements in customer relationship processes.

The methodology presented by Chalmeta (2006) consists of several interconnected phases, beginning with an analysis of the company's mission, vision, organizational culture, and strategic objectives. This initial stage is considered essential to ensure that the implementation of CRM is in line with the identity and direction of the organization.

In the next phase, customers and their needs are identified through the use of tools such as interviews and questionnaires with employees. These allow the mapping of existing processes (AS-IS) and the design of desired processes (TO-BE), in a customer-oriented transformation logic.

One of the central points of the methodology is the emphasis on the involvement of human resources from the early stages of the project. Team awareness and commitment are recognized

as critical factors for success, as they promote interdepartmental cooperation and alignment with CRM objectives.

The methodology also provides for the selection of the CRM technology best suited to the specificities of the organization. Chalmeta (2006) points out that this technology should enable the automation and optimization of sales, marketing, and after-sales service processes, as well as the monitoring of the customer lifecycle. Based on the data collected, the company should select the type of CRM to adopt (operational, analytical, or collaborative), according to its needs.

The implementation phase includes change management and the transition from the current state (AS-IS) to the future state (TO-BE), which often involves organizational restructuring, redefinition of roles, and implementation of improvement projects. The methodology also emphasizes the importance of an effective communication plan and the formation of internal teams to facilitate change.

Finally, Chalmeta (2006) proposal includes continuous monitoring of implementation through the definition and evaluation of performance indicators, as well as the application of quality assurance methods, ensuring that the outlined objectives are being effectively achieved.

In addition, other authors such as Osarenkhoe and Bennani (2007) warn of the risks associated with implementing CRM systems without a well-defined strategic basis. Their studies show that adopting CRM without prior analysis, adequate training of employees, and coherent integration with existing systems can lead to the failure of the initiative or its underutilization. These aspects are therefore fundamental criteria to consider in the implementation planning phase.

More recently, Rahimi (2017) reinforced these perspectives by demonstrating that CRM success depends on the balanced integration of people, processes, technology, and organizational culture. Their study in the hospitality sector highlights that, even when robust technological infrastructures are available, the absence of cultural alignment and user adoption prevents CRM initiatives from achieving strategic value.

Payne and Frow (2005), in turn, broaden the strategic perspective by proposing an integrated structure composed of five key processes common to organizations that are successful in adopting CRM: (i) strategy development, (ii) value creation, (iii) multichannel integration, (iv) information management, and (v) performance evaluation. These authors reinforce the need for alignment between the organizational vision and the CRM strategy, emphasizing that the absence of a clear definition can generate internal conflicts and compromise results.

In summary, these theoretical contributions converge on the idea that the successful implementation of CRM systems depends not only on the appropriate selection of technology, but above all on the adoption of a holistic organizational approach. This should include strategic leadership, people involvement, process integration, and a customer-oriented corporate culture.

The relevance of these theoretical methodological approaches will now be confronted with practical reality through the analysis of four selected case studies that illustrate different ways of implementing CRM in different organizational contexts.

2.2 Practical Cases

Having addressed the main methodologies proposed in the literature for the implementation of CRM systems in the previous section, it is now important to understand how these guidelines are reflected in real business contexts. The analysis of practical cases allowed testing the applicability of theoretical models and understand how organizations adapt their CRM strategies to their specific reality.

To this end, four representative case studies from different sectors were selected, offering a diverse perspective on the challenges faced, the solutions adopted, and the results obtained. These concrete examples enable a critical comparison between theory and practice, allowing to identify success factors, methodological limitations, and lessons that can be learned for future implementations.

2.2.1 Case Study 1 - Fine Equity Bank

This case study focuses on the banking sector, analyzing the implementation of a CRM strategy at Fine Equity Bank, a financial institution that faced significant challenges in terms of customer loyalty and the effective use of available technological tools. The main objective of the initiative was to develop a customer-centric CRM approach with a view to improving long-term profitability through customer value management.

Prior to implementation, the bank had several limitations: lack of a well-defined CRM strategy, weak top management involvement, organizational resistance to change, and limited use of previous systems. These gaps resulted in poor integration between departments and channels, leading to a fragmented customer experience.

To address these issues, Kim et al. (2010) proposed a methodological approach based on three fundamental pillars: (i) repositioning CRM as a business strategy and not merely as a

technological tool; (ii) using financial metrics as a basis for decision-making, such as customer value over time and retention rate; and (iii) ensuring the continuous involvement of organizational leadership throughout the process.

The methodology adopted was qualitative in nature, using interviews with managers and employees directly involved in the implementation of CRM, as well as documentary analysis of practices and systems used by the institution.

The implementation process was structured in several phases, namely: diagnosis of the current state, definition of strategic objectives, redesign of the CRM approach, integration of technological solutions, and continuous evaluation of the value generated. This holistic methodology integrated the areas of marketing, technology, and customer relationship management in a cross-functional manner.

The team involved was composed of top managers, with active participation from the sales, marketing, and information technology departments. The evaluation of the implementation's success was based on indicators such as Customer Lifetime Value (CLV), retention rate, customer satisfaction level, and profitability per segment.

The main results were a significant improvement in customer loyalty, greater integration between channels, and a more customer-oriented corporate culture. Nevertheless, the project faced considerable challenges, including resistance to change, complexity in integrating dispersed data, and internal technological limitations. Nevertheless, the case demonstrated that, with committed leadership and a clear strategic vision, the implementation of CRM can be a determining factor in transforming the relationship between the bank and its customers.

2.2.2 Case Study – ELMS Ltd.

This case study analyzes the implementation of a CRM system at ELMS Ltd., a UK-based manufacturing company that was facing business decline and competitive pressure. Senior management saw CRM as a potential solution to reverse the situation, placing great expectations on the system as a means to recover profitability and rebuild customer loyalty.

Prior to implementation, the company presented several structural weaknesses: the absence of a well-defined strategic plan, lack of alignment between departments, and over-reliance on external consultants to design and deploy the CRM system. Employees received little or no training, which meant they were not prepared to adapt processes or use the tool effectively. These limitations created a fragile foundation for the project, with technology being treated as a stand-alone solution rather than part of a broader organizational transformation.

The methodology adopted was qualitative, based on a single case study that examined management decisions, system deployment, and employee experiences during the implementation process. The analysis revealed that, rather than improving efficiency and customer relations, the CRM generated resistance, operational bottlenecks, and even greater fragmentation in communication flows.

The implementation followed several attempts to configure and reconfigure the system, but all were undermined by the lack of internal ownership. The company depended heavily on the provider to solve problems, without developing in-house expertise or embedding the system into daily routines. As a result, the CRM became a source of frustration for employees, who perceived it as an additional obstacle rather than a support tool.

The main results were largely negative. Instead of consolidating customer information and improving service, the CRM aggravated inefficiencies and contributed to customer dissatisfaction. Competitors, who implemented CRM more effectively, gained advantage, leading ELMS to lose market share. What was initially seen as a path to regain competitiveness turned into a failed project that highlighted the risks of poor planning and lack of change management.

This case demonstrates that CRM adoption is not simply a matter of technology acquisition but requires strong leadership, cultural alignment, and employee training. Without these elements, as the ELMS experience illustrates, CRM implementation can exacerbate existing problems and place the company at an even greater disadvantage.

2.2.3 Case study 3 - FX

This case study focuses on the implementation of a CRM system in a telecommunications company that faced challenges related to efficient customer relationship management and the need to modernize its customer service and sales processes. The main objective of the initiative was to improve the customer experience, increase loyalty, and optimize responsiveness through an integrated system.

The authors, Beldi et al. (2010), used a qualitative approach, collecting data through semi-structured interviews with managers and employees involved in the CRM implementation process. It was identified that the company suffered from disjointed systems and a lack of a unified view of the customer, which resulted in a fragmented experience and difficulties in personalizing services.

The implementation process involved analyzing existing systems, defining specific requirements for the new CRM, training teams, and adapting internal processes to ensure the correct use of the tool. The importance given to employee training and cultural change management, elements considered essential to the success of the project, is noteworthy.

The results pointed to a significant improvement in the integration of communication channels, the personalization of offers, and operational efficiency. However, challenges were also identified, such as initial resistance from employees, the complexity of data migration, and the need for continuous improvement of the system.

This case shows that, in highly competitive sectors such as telecommunications, the implementation of an effective CRM depends not only on technology, but also on strategic alignment and the involvement of people in the organization.

2.2.4 Case study 4 - Merck-Medco

This case study presented by Torkzadeh et al. (2006) focuses on the pharmaceutical sector and analyzes the main challenges faced during the implementation of its CRM system. The main objective was to identify critical factors that affected the performance and acceptance of the system in order to support sustained improvements in customer relationship management.

Prior to implementation, the company faced significant problems related to the complexity of the system, inadequate user accountability, duplication of processes, and low compliance with Standard Operating Procedures (SOPs). In addition, customer contact channels were fragmented, which undermined the user experience and satisfaction.

The methodology adopted was quantitative and qualitative, beginning with focus groups composed of key users of the CRM system, whose objective was to identify operational problems. The authors then applied a survey to a sample of 1,460 employees from different departments (call centers, supervisors, managers), with questions structured based on the themes identified previously.

The analysis used Exploratory Factor Analysis (EFA) and Structural Equation Modeling (SEM) to develop and validate a model with seven main factors of failure in CRM:

- Inadequate user accountability;
- Poor adherence to standard operating procedures;
- Problems in customer contact processes;
- Inefficiency in billing processes;
- Ambiguity in the error correction process;

- Insufficient technological resources;
- Poor integration of workflows;

These factors were then related to the perceived impact on CRM performance and customer service. The team involved in the analysis was multidisciplinary, consisting of managers, process analysts, and operational teams.

As part of the corrective actions after identifying operational problems, the company turned to specialized external technicians to train employees and reinforce adherence to SOPs. The goal was to ensure a better understanding of the system, improve its use, and increase the effectiveness of workflows.

In addition, this measure aimed to overcome resistance to change and mitigate the impact of technological complexity by promoting a more collaborative and customer-centric culture.

Although traditional financial KPIs were not used, the analysis focused on users perceptions of the system's efficiency, compliance, and responsiveness. The data revealed that the biggest obstacles were linked to organizational and human factors, not just technological ones.

As a result, the company initiated a plan to overhaul its CRM processes, focusing on aligning technology and operational practices, strengthening internal training, and clearly defining the roles and responsibilities of system users.

Despite the progress made, substantial barriers were identified, such as resistance to change, lack of clarity in processes, and difficulties in managing large volumes of data. The study reinforces that technology alone doesn't guarantee the success of CRM, and that strong governance, active leadership, and an organizational design consistent with the system's objectives are essential.

2.2.5 Case Analysis

In order to better understand and analyze the case studies presented, a comparative table was drawn up (Appendix A), which provides a summary of the methodologies, solutions adopted, and main results achieved by each of the organizations.

It was found that all cases share very similar problems, namely the fragmentation of information, organizational resistance to change, and the absence of an integrated customer-centric strategy. A recurring point was the emphasis placed on cultural transformation as a prerequisite for technological success: it became clear that technology alone does not generate

results, requiring a change in people's mindsets and a clear alignment between processes, people, and systems.

Another common element was the search for effective and centralized information management, since the dispersion of data between different departments made it difficult to create a unified view of the customer. Thus, the alignment between the company's strategy, the objectives of the CRM project, and the involvement of employees, from top management to end users, proved to be decisive.

Regarding the methodology adopted, most cases opted for qualitative approaches based on semi-structured interviews with different hierarchical levels. This method allowed the identification of barriers, expectations, and opportunities, serving as a basis for the development of metrics and proposals for improvement. The implementation of KPIs was identified as fundamental for monitoring the effectiveness of the system and ensuring that strategic objectives were being met.

A common structure was also found in the implementation process: initial diagnosis, definition of objectives, process reconfiguration, technological integration, and continuous evaluation. This sequence made it possible to respond to organizational challenges in a progressive and coordinated manner.

In terms of results, three of the cases highlight that adopting an effective CRM system requires a solid foundation of integration between organizational culture, technological solutions, and people empowerment. Resistance to change and internal technological limitations emerge as recurring challenges, reinforcing the need for active leadership and a participatory approach. However, the ELMS Ltd. case analyzed by Bull (2003) illustrates a contrasting outcome: rather than solving problems, CRM adoption aggravated inefficiencies due to lack of training, poor alignment with strategy, and over-reliance on external consultants. This negative result shows that when needs are not identified in advance and employees are not prepared to use the system, CRM implementation can create more obstacles than benefits.

It should also be noted that, of the four cases analyzed, three were based exclusively on qualitative methodologies, which, although adequate for exploring perceptions in depth, limits analytical robustness due to the absence of triangulation with quantitative data, internal documentation, or direct customer feedback. The exception was the Merck-Medco case, which combined qualitative and quantitative methods, used a larger sample, and applied advanced statistical techniques, allowing for a more robust and representative analysis.

Although each case study focused on different sectors (banking, manufacturing, telecommunications, and pharmaceuticals), the way CRM systems were applied followed a

common methodological pattern. This finding reinforces the idea that, regardless of the sector, the structured implementation of a CRM is essential to improve internal processes, optimize the service provided, and, above all, strengthen customer relationships. The cross-cutting nature of the model confirms its strategic value as a tool to support competitiveness and organizational innovation.

Moreover, across the cases, the systematic identification of organizational and customer needs was the decisive input to prioritize initiatives, select CRM types and modules, and sequence implementation efforts. In other words, needs elicitation preceded and guided the CRM roadmaps: by clarifying what problems had to be solved and what capabilities were most critical, organizations were able to orient the project more effectively. The case of ELMS Ltd. further demonstrates the risks of skipping this step, since the absence of a structured needs assessment resulted in failure rather than improvement. This reinforces the central message that identifying needs is not only a success factor but also a safeguard against the misuse of CRM technologies.

2.3 Final Considerations of the Literature Review

This literature review provided an in-depth understanding of the concepts, methodologies, and practices associated with the implementation of CRM systems. The theoretical analysis highlighted the importance of a strategic and integrated approach that involves not only technology but also organizational culture, internal processes, and, above all, the human factor.

The practical cases analyzed reinforce these premises, showing that, regardless of the sector of activity, the effective implementation of a CRM system requires alignment between organizational objectives, appropriate technology, and people involvement. It was observed that the main challenges faced by organizations are recurrent, namely resistance to change, fragmentation of information, and the absence of a clear strategy.

By comparing theory and practical cases, it became clear that the methodologies proposed in the literature are applicable but require adaptation to the reality of each organization. The use of qualitative approaches, leadership involvement, and the definition of performance indicators proved to be critical success factors.

This review thus establishes a solid basis for the development of empirical work, allowing subsequent research to be supported by consolidated theoretical foundations and relevant practical evidence. It is important to note that this study is limited to analyzing and identifying needs for future CRM implementation. While the cases analyzed refer to organizations that

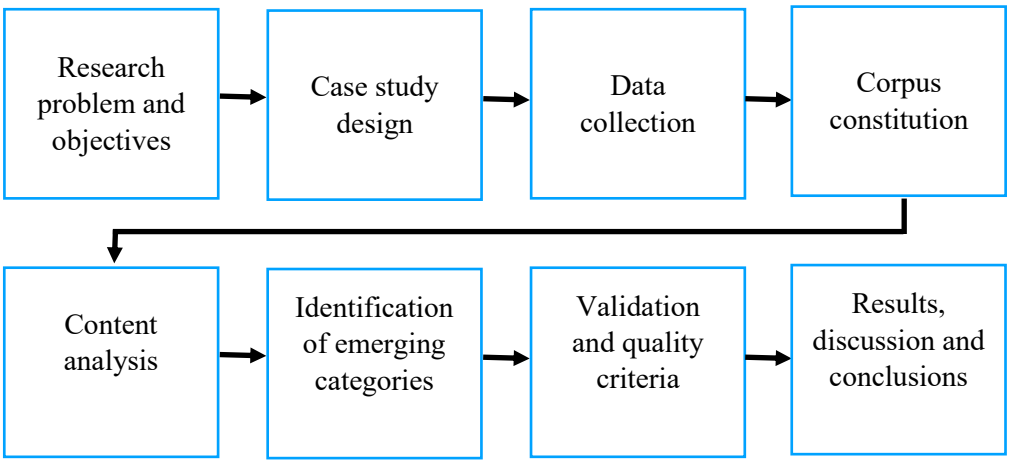
already had CRM systems in place, the company under study has not yet implemented such a system. Thus, the evidence presented serves as a reference for identifying best practices, avoiding recurring errors, and understanding which factors proved to be decisive for the success or failure of implementation in different contexts.

This gap reinforces the relevance of the present research, which focuses on identifying and analyzing needs as a preliminary step to support potential CRM implementation in the pharmaceutical B2B context.

3. Methodology

This chapter presents the methodology adopted in this study, detailing the research design, the data collection and analysis methods, and the criteria applied to ensure quality and validity. The case study strategy (Yin, 2013) was chosen as it allows an in-depth and contextualized understanding of the phenomenon under investigation.

Figure 1. Methodological workflow of the case study.



Source: Own elaboration.

Figure 1 summarizes the methodological workflow, which begins with the definition of the research problem and objectives, followed by the case study design and data collection. The corpus is then constituted and analyzed through content analysis, from which needs emerge. Finally, validation and quality criteria are considered, culminating in the discussion of results and conclusions.

The sequence of these stages is essential, as each contributes in an integrated way to addressing the research objectives and answering the questions defined at the outset.

3.1 Study Design

The choice of a case study is justified because, according to Yin (2013), this method allows for the investigation of "how" and "why" questions in contemporary situations, making it particularly suitable for the exploratory analysis carried out in this investigation.

In this sense, it becomes possible to answer the research questions presented in Chapter 1 and meet the main objective of this research. The questions are to understand what needs are essential for the future implementation of a CRM system in the company under study, and how

the identification of these needs can contribute to improving B2B customer relationship management.

The case study allows for an in-depth analysis of a contemporary phenomenon in the real context of the company under analysis, without direct intervention by the researcher. As the study focuses on only one organization in the pharmaceutical sector, it is a single case study. The research is exploratory in nature, enabling the examination of the company's current situation, understanding how customer managers conduct their daily activities, and how they relate to customers. This exploration process makes it possible to identify gaps and needs that may serve as input for a future CRM implementation.

Following the structure proposed by Yin (2013), this case study was designed based on five essential components. The research questions already stated guide the investigation. As this is an exploratory study, no initial theoretical propositions were defined, but rather an attempt was made to gather the participants' perceptions and emerging needs. The unit of analysis corresponds to the B2B pharmaceutical company under study and, in particular, to the customer relationship management process carried out by managers in the SAC department. The logic linking the data to the objectives is based on the collection of multiple sources of evidence (interviews, document analysis, direct observation, and participant observation), whose interpretation will be conducted through content analysis, allowing for the organization of thematic needs. Finally, the criteria for interpreting the results focus on identifying needs that reflect the perspectives of managers and contribute to improving customer relationships.

3.2 Justification for the Choice of Case

The choice of the company under study is justified, first, by the relevance of customer relationship management in the pharmaceutical sector, where the exchange of information plays a central role in B2B interactions. This is a critical and highly competitive sector, where effective CRM practices can represent a significant strategic advantage.

Secondly, the fact that the researcher is interning at the organization has provided privileged access to a variety of internal information and processes, allowing for close observation of the organizational reality. This condition contributes to the depth and richness of the data collected, aspects highlighted by Yin (2013) as determinants of the quality of a case study.

Finally, the central objective of this project is to identify and analyze the needs for the future implementation of a CRM system, directly aligned with the company's current challenges. Thus, the selected case is particularly suitable for answering the defined research

questions. Although case studies are frequently associated with “how” and “why” questions, Yin (2013) also emphasizes their suitability for exploratory “what” questions, as they allow for a comprehensive examination of complex contemporary phenomena within their real-life context.

3.3 Sources and Data Collection Techniques

According to Yin (2013), the use of multiple sources of evidence is crucial in a case study, as it allows for data triangulation and, consequently, increases the validity of the research. In this study, the following sources of evidence were used: interviews, direct observation, participant observation, and documentation.

The interviews were conducted in a semi-structured manner, based on previously defined questions, but maintaining a flexible and spontaneous character, which made it possible to explore managers perceptions of CRM.

Participant observation, resulting from the researcher's placement in the company as an intern, provided a practical understanding of how the customer relationship management process was carried out on a daily basis. In addition, direct observation made it possible to identify the steps taken by managers in their work routines.

The annual customer satisfaction survey conducted by the company. Although not designed by the researcher, this tool was a relevant source of data, providing access to the customer's perspective and thus complementing the information gathered from managers.

Finally, internal documentation includes reports extracted from System Applications and Products in Data Processing (SAP), user manuals, and monthly reports sent to customers.

These documents complemented the interviews and observations, providing objective evidence about customer relationship management processes.

3.4 Analysis Method

The analysis method adopted in this study is content analysis, defined by Bardin (2020) as a set of techniques that allow the description, systematization, and interpretation of communication content in order to transform raw data into meaningful and organized information. This methodology is widely used in qualitative studies, as it allows data to be reduced to key elements and grouped into thematic categories, thereby facilitating interpretation in line with the research objectives. According to Bardin (2020), content analysis is organized into three main phases: pre-analysis, exploration of the material, and treatment and interpretation of the

results. In this study, the application of these steps made it possible to transform the different sources of evidence into thematic categories, which served as the basis for identifying and analyzing the needs related to customer relationship management and the future implementation of a CRM system.

3.4.1 Corpus Constitution and Pre-Analysis

The pre-analysis phase corresponded to the organization and preparation of the empirical material to be studied, establishing the research corpus. The corpus consisted of:

- Semi-structured interviews with four customer managers (two senior and two new to the role) and the logistics director, responsible for the overall monitoring of the department. It was decided to adopt units of recording in the form of thematic summaries, rather than literal transcripts, in order to bring together similar expressions used by different participants. Thus, individual sentences were grouped and rewritten in the plural whenever there was a convergence of perceptions, allowing common and recurring ideas among the interviewees to be highlighted. This procedure, as pointed out by Bardin (2020) and Carlomagno & Rocha (2016), is suitable for content analysis, as it favors the identification of patterns without compromising fidelity to the empirical material.

- Direct and participant observation notes, taken during the internship at the company, which allowed us to understand the functioning of internal processes and the interaction of managers with customers.
- Internal documentation, including reports and records extracted from the SAP system.
- Satisfaction survey of 18 B2B customers, which assessed dimensions such as Assistance, Accessibility, Response time, Flexibility, Implementation of changes in packaging materials, Monthly inventories of customer materials, Complaint handling, Overall assessment, Company recommendation, Continuity in the use of services, Strengths, Weaknesses and Opportunities for improvement.

The corpus was constructed according to the criteria proposed by Bardin (2020), ensuring exhaustiveness (inclusion of all relevant sources), representativeness (adequacy of the data to the phenomenon studied), homogeneity (focus on customer relationship management), and relevance (direct link to the research questions).

3.4.2 Material Exploration

Material exploration was the core of the analysis, involving coding and categorization operations. At this stage, the interviews, documents, and qualitative responses from the survey were broken down into units of record (significant phrases or ideas). Each unit was then coded (Appendix D), given a representative label, and grouped into thematic categories that reflect central aspects of customer relationship management.

To ensure greater rigor in the constitution of these categories, the recommendations of Carlomagno and Rocha (2016) were applied, which emphasize the need for: (i) clear inclusion and exclusion criteria, (ii) mutually exclusive categories, (iii) homogeneity within each category, (iv) full coverage of the analyzed content, and (v) objectivity in classification.

This exploration process followed a systematic and inductive logic, allowing the reduction of complex data into organized themes without losing the richness of the original perceptions. The resulting categories were interpreted as emerging needs, representing the main requirements identified for improving customer relationship management in the company.

3.4.3 Treatment and Interpretation of Results

In the last phase, the categorized data were organized and interpreted in light of the research questions, which made it possible to identify patterns, needs, and gaps in customer relationship management processes. This analysis allowed cross-referencing the internal perspective (managers and director) with the external view (customers, via a satisfaction survey), ensuring a triangulation of data that reinforces the validity of the study, as recommended by Yin (2013).

Based on this interpretation, it was possible to identify a set of needs for a future CRM system, namely the centralization of communication history, the consolidation of complete customer profiles, the integration of real-time performance indicators, the automation of alerts and reminders, and the generation of reports adapted to the requirements of customers and managers.

3.5 Quality Criteria

The quality of the case study was ensured based on the criteria defined by Yin (2013), widely used in qualitative research. These criteria include:

- Construct validity was ensured by using multiple sources of evidence, namely interviews with managers and the director, direct and participant observation, internal documents, and customer satisfaction survey results. This triangulation allowed for a richer and more credible understanding of the phenomenon under analysis.
- Internal validity, according to Yin (2013), applies mainly to explanatory studies and is less associated with exploratory or descriptive research such as this one. Therefore, this criterion is not considered central to this research.
- External validity refers to the possibility of generalizing the results. In the case of the present study, it is not a statistical generalization, but rather an analytical generalization, as advocated by Yin (2013), in which the results are interpreted in light of theory and may be applicable to similar contexts in the B2B pharmaceutical sector.
- Reliability was ensured by the transparent and detailed description of the procedures adopted, including the process of data collection, organization, and analysis, enabling another researcher, following the same steps, to reach similar conclusions.

Additionally, the maintenance of a chain of evidence (Yin, 2013) was ensured, allowing the reader to follow the path from the research questions to the final conclusions. The interpretations presented are always anchored in concrete data, quotes from interviews, observation records, or internal documents, ensuring the traceability and transparency of the analysis process.

In summary, the methodology adopted was based on a single case study of an exploratory nature, following the guidelines of Yin (2013). Data collection involved interviews, direct and participant observation, internal documents, and customer surveys, with analysis conducted through content analysis (Bardin, 2020). These procedures ensure the validity and reliability of the study, allowing the research questions to be answered. Based on the methodological procedures described, the next chapter presents the analysis of the results obtained, organized according to the needs emerging from the content analysis.

4. Presentation and Analysis of Results

This chapter presents and analyzes the main results obtained from different sources of evidence: semi-structured interviews, direct and participant observation, and customer satisfaction surveys. The data are detailed in order to provide a comprehensive understanding of how the Customer Service Department works, considering both the perspective of managers and customers.

4.1 Interviews

The interviews were conducted with the main CRM users: four customer managers (two senior and two junior, newly appointed) and the logistics director, responsible for coordinating the team and overseeing customer relations within the SAC department. The interviews (Appendix B) were guided by a script of direct questions, allowing for objective and spontaneous answers. They were conducted individually, without the participants having prior access to the questions, which ensured greater authenticity of the answers. All interviews were recorded to ensure data integrity and allow for subsequent analysis.

A total of 23 questions were asked, organized into topics covering the main dimensions of customer relations: Customer Communication, Customer Information, Operational Management, Forecast Management, Performance Indicators, Contact Management, Alerts and Tasks, and Other Suggestions. The complete set of interview responses is available in Appendix C. These topics were defined based on direct observations and participant observations made by the researcher, as well as analysis of internal documentation, which made it possible to identify how customer relations were structured within the company.

After the data collection, the responses were consolidated into a table (Appendix D), from which recording units were constructed. These do not correspond to literal transcriptions, but rather to thematic summaries that aggregated similar expressions from different interviewees. The units were then coded, moving to a more specific and coherent analytical language. This process revealed that several units corresponded to similar problems, even though they had arisen in different topics.

To deepen the analysis, the codes were grouped into groups (A–F), from which six final thematic categories emerged (Appendix E), representing the central dimensions of the experience reported by the managers and the logistics director and interpreted as the key needs related to customer relationship management:

Information Management and Centralization

This category refers to the need to integrate the various data that make up the customer profile, as well as their orders. A junior manager pointed out: “A complete profile is necessary: materials, products, artworks, agreements, since everything is scattered throughout SAP.” This perception highlights the importance of synthesizing information in a single, easily accessible location, as also observed in the registration unit: “the information available in SAP about orders and customers is scattered, it is necessary to resort to different transactions.” In addition, centralization would help to avoid information loss when managers are replaced, ensuring continuity and allowing data from other departments, such as finance, to be aggregated**.**

Process Automation

Respondents consistently mentioned the high workload of manual procedures, often associated with oversights or inconsistencies. As exemplified in the registration unit: “the management of information sending is done by manually validating whether it has been sent or not.” The dependence on manual processes implies not only greater time expenditure but also a lack of standardization. In the case of forecasts, after being updated in the system, they still need to be stored in shared folders, to which everyone has access. Similarly, monthly reports sent to customers require additional adjustments and comments from the director before being sent, representing an additional effort that could be avoided with greater automation.

Monitoring and Access to Indicators

This category highlights the need to monitor the service provided to customers more systematically. Currently, this monitoring is carried out only once a year, through a general satisfaction survey covering all areas of the company: “evaluation surveys are conducted annually and cover all areas of the company”.

However, this tool does not take into account the specificities of the SAC department, which limits the collection of relevant indicators to assess and strengthen the performance of managers.

It was also pointed out that customers themselves value more frequent monitoring practices. As one manager pointed out: "In June, I received a customer evaluation as part of an internal procedure on their side, in which they rated us at 53%. We appreciate the feedback, but they were not satisfied and asked to schedule a meeting to select opportunities for improvement".

These aspects reinforce the need to define more personalized KPIs and to conduct satisfaction surveys more regularly (e.g., quarterly) in order to support continuous improvement and customer proximity.

Interaction History

This category reflects the absence of a centralized record of customer interactions that would allow all email exchanges, meetings, and calls to be consolidated in one place. Currently, the information is scattered, forcing managers to search different sources whenever they need to retrieve data or reconstruct contact history.

The lack of this record hinders not only the continuity of the customer relationship, but also the sharing of information between departments. Centralizing the interaction history would thus contribute to greater transparency, efficiency, and internal alignment, allowing any employee to have quick and up-to-date access to relevant customer information.

Formalization of Processes

The absence of clear and documented procedures emerged as one of the main obstacles to information management and order tracking. As managers point out, “it is difficult to find emails because there is no procedure in place” and “changes to orders are all made in SAP and nothing is documented, only emails remain as proof”. This reliance on email as the only form of record keeps compromises traceability, generates rework, and increases the risk of information loss in critical situations.

In addition, it was identified that changes in management, both on the company and customer side, require the repetition of information already shared, “as if it were the first time”, highlighting the lack of a common documentation standard. Therefore, it is necessary to formalize policies and procedures that ensure consistency, organizational memory, and greater efficiency in communication with customers.

Alert and Reminder Management

Another need highlighted was for automatic alert and reminder mechanisms for critical tasks. Currently, managers use parallel tools such as Teams and Outlook to keep track of deadlines or important changes, as mentioned: “most use Teams and Outlook as a critical task manager”.

This practice, although useful, is insufficient, as it depends on individual discipline and is not integrated with other systems.

The absence of centralized automatic reminders increases the risk of failures in the execution of relevant activities, such as managing changes to orders, sending reports, or updates requested by the customer. Thus, there is a reinforced need to implement an alert management system integrated into the CRM platform, ensuring greater reliability and reducing dependence on manual and scattered solutions.

4.2 Direct and participant observations

The fact that the researcher completed a one-year internship at the company enabled not only observation but also participation in various tasks, allowing for a practical understanding of how the processes work.

It was possible to participate in SAP training, which allowed her to monitor how information is managed in the system, understand the use of transactions, and observe the dispersion of information already reported by managers. To view customer orders, the manager needs to use transaction VA05; to access the list of raw materials supplied by customers, transaction ZRCD_SD_RP_005 is used; reports on firm orders in progress are consulted using ZRCD_SD_RP_009; material movements using ZRCD_MM_RP_001; and stock using ZRCD_MM_RP_002.

In addition, general customer data (address, contacts, account manager, customer class, etc.) is stored in a shared internal network database, which is manually updated by SAC managers this set of evidence confirms the dispersion of information.

The observation also allowed us to monitor the logistics processes. A visit to the warehouse revealed that it is responsible for around 90% of shipments, carried out under the Incoterm Ex Works (EXW), as well as for managing data loggers and thermal blankets requested by customers. However, this information is not available in SAP, being transmitted informally, often memorized by senior managers and not accessible to junior staff.

During internal and external meetings, it was also noted that there were no formal procedures for taking minutes, which makes it impossible to create a history of interactions. Each manager adopts their own practices, such as personal notes in diaries or in SAP, but there is no systematization. The director also reported that, in some cases, it is the customers

themselves who request the recording of meetings, with the sending of the record depending on their initiative.

4.3 Internal documentation

Consulting internal documentation was another essential contribution to the analysis. The SAP user manual, available to all employees, provided insight into the procedures currently adopted in order and customer data management, highlighting the system's limitations for CRM purposes.

Documentation relating to SAP training was also analyzed, in which trainees evaluate the content and performance of trainers. These documents highlight the skills expected of customer managers, but do not include specific modules related to customer relationship management.

Reports sent monthly to customers, such as open order reports and stock movement reports, are a fundamental part of formal communication. They are extracted from SAP in Excel format and contain data such as order number, product code, expected delivery dates, and additional comments. Analysis of these reports provided an understanding of the information flows exchanged between the company and its customers, as well as the current reporting and monitoring mechanisms.

In general, observation and internal documentation confirm the needs already identified in the interviews and support the creation of the categories presented in the previous point, especially with regard to the dispersion of information, the absence of a structured history, and the need for process automation.

4.4 Satisfaction Survey

The satisfaction survey sent to customers is conducted annually, at the end of each year, with the aim of gathering their perceptions of the services provided by the company. This instrument was not developed by the researcher, but is the result of already established internal practices, which is why some of the dimensions evaluated were not relevant to the objectives of this research.

In this sense, a selection was made of the dimensions most directly related to the functioning of the SAC department (Appendix F), namely: Assistance, Accessibility, Response time, Flexibility, Implementation of changes in packaging materials, Monthly inventories of

customer materials, Complaint handling, Overall assessment, Company recommendation, Continuity in the use of services, Strengths and Weaknesses, Opportunities for improvement.

The survey was sent to a total of 28 customers, from whom a total of 18 responses were obtained. The scale used was four levels (Poor, Average, Good, and Very Good) supplemented by open-ended questions that allowed customers to justify their ratings or express additional opinions.

Assistance

This indicator was rated by 50% of customers as Very Good, 44% as Good, and only 6% as average, showing an overall positive perception. These results demonstrate that customers are generally satisfied with the collaboration provided, although they recognize room for improvement.

From an internal perspective, this dimension connects to the needs identified in the categories of Information Management, Centralization, and Process Automation. Managers mentioned the need to synthesize all customer information in a single location, in a detailed and accessible manner, which would facilitate a more direct and effective approach. Combined with interaction history, such as interaction records, this integration would allow for even more personalized assistance. Thus, cross-referencing centralized data and recorded interaction histories would contribute to faster service tailored to the specific needs of each customer.

Response time

Response time was rated by 50% of customers as Good, 28% as Very Good, and 22% as Poor. These results reveal that, although there is an overall satisfactory perception, this is an area that requires attention, since almost a quarter of customers rated it negatively.

This weakness is directly related to the Process Automation needs identified in the interviews. Managers reported that many tasks are still performed manually, which delays responses and increases the risk of errors. The implementation of automated processes and the centralization of customer data could significantly reduce the time needed to access relevant information, enabling faster and more consistent responses.

Accessibility

This dimension refers to the ease with which customers can obtain information or support from the Customer Service Department. It was rated as Very Good by 50% of customers and Good by the remaining 50%, showing an overall positive perception. Customers are therefore satisfied with the department's availability and ease of contact.

However, the data collected in the interviews reinforce that the creation of a centralized history and the integration of scattered information could further improve this indicator, ensuring faster and more consistent access to the data requested by customers.

Flexibility

Flexibility was defined as the company's ability to adapt to changes requested by customers, such as increases in quantities, modifications to artwork, or adjustments to delivery dates. The results show a mixed distribution: 39% rated it as Good, 33% as Very Good, 11% as Average and Poor, and 6% as Very Poor.

The negative assessments (around 17%) suggest that this dimension represents a structural challenge for the company, as it is not always possible to guarantee adaptation to changes requested by customers. In this sense, the limitation is less associated with the work of the SAC department and more related to the organization's overall ability to make production processes and deadlines more flexible. Even so, the absence of formal procedures for recording and monitoring these changes, identified in the interviews, can weaken communication and increase the perception of rigidity among customers.

Implementation of changes in packaging materials

This dimension was rated as 44% good, 39% very good, 6% very poor and average, and 5% poor. These intermediate responses reveal room for improvement. The implementation of new graphic designs is a critical process in the pharmaceutical industry, given its complexity and direct impact on delivery times.

Although technical responsibility falls to other areas of the company, SAC department plays a central role as a point of contact with customers, ensuring that changes are communicated and their status monitored. In this sense, the absence of formal procedures and

automatic alerts, already identified in the interviews, can weaken the perception of effectiveness in this process.

Monthly inventories of customer materials

The monthly inventories, extracted from SAP and sent directly to the customer, reflect the consumption of materials supplied by the customer themselves and used by the company in production. This indicator was rated as Good by 56% of customers, Very Good by 17%, Average and Very Poor by 11%, and Poor by 5%. The distribution shows a mostly positive perception, but with negative assessments that indicate room for improvement.

From the customer service perspective, this dimension is strongly linked to information management, as it involves data considered critical by customers because it concerns materials that belong to them. The need to ensure accuracy and clarity in the communication of these inventories reinforces the importance of process automation in order to avoid manual errors, reduce validation time, and ensure greater customer confidence.

Complaint Handling

Complaint handling was rated as Good by 67% of customers, Very Good by 22%, Average by 6%, and Poor by 5%. Overall, customers recognize that complaints are handled appropriately, although they identify room for improvement.

In practice, complaints are managed according to the department responsible for the origin of the problem, with the SAC department responsible for forwarding and monitoring the process until its resolution. In this sense, information management and the existence of a centralized history are essential to ensure effective follow-up, avoiding data loss or communication failures between areas. In addition, monitoring and access to performance indicators related to complaint handling could strengthen customer confidence, allowing for greater transparency and speed in resolution.

Overall Assessment

The overall assessment, which summarizes customers' perceptions of the set of dimensions evaluated, revealed that 45% considered the service unchanged, 44% pointed to improvements, and 11% indicated that it remained at the previous year's level. These results suggest moderate progress and show that, although improvements are recognized, there is still significant room for further progress.

This indicator is particularly related to monitoring and access to indicators, since the company only collects formal feedback at the end of each year. In the interviews, managers emphasized the need for more frequent assessments and direct access to results so that they can monitor the impact of their work and intervene more quickly.

Company Recommendation

When asked if they would recommend the company, 89% of customers said they would, while 11% responded negatively.

Among the comments recorded, some customers highlighted positive aspects, such as "Very good communication and relationship" and "Very good communication with Quality, operations, and supplies," recognizing the good coordination with certain internal areas.

However, there were also criticisms pointing to significant weaknesses: "long delays in product delivery," "unjustifiable delays, bad manner of communication, lack of flexibility and transparency," and "sometimes it is hard to obtain answers before the next monthly meeting."

Thus, although most customers express a willingness to recommend the company, the criticisms highlight critical points that directly affect the perception of the service, especially with regard to information management and the responsiveness of customer service.

Continuity in the use of services

Regarding continuity in the use of services, 83% of customers said they intend to continue working with the company, 11% said they probably would, and only 6% responded negatively. The latter justified their decision by citing the discontinuation of certain products by the company, which makes it impossible to continue the business relationship.

Overall, the indicator reveals a positive assessment, demonstrating the intention of most customers to remain. However, it is important to highlight the relevance of the 11% who expressed some hesitation, as this group may represent a risk of future dissatisfaction. In this sense, investing in improving the dimensions already highlighted, namely monitoring and access to indicators, process automation, and interaction history, is a strategic opportunity to strengthen trust and consolidate customer relationships.

Strengths and Weaknesses

In the survey, customers were asked to indicate the company's main strengths and weaknesses, among the strengths, references to “communication, accessibility, and fulfillment of commitments,” “responsiveness, availability, and quality,” “quality, availability, and accuracy,” and “friendliness, quality, and management of new packaging materials” stood out.

As for weaknesses, customers mentioned aspects such as “time for responses from some departments - some lead times for some documents,” “improve delivery times,” “bad way of manner, not flexible, slow response,” and “lack of flexibility in changing production, lack of options for small batch production.” The latter reinforces the perception already evident in the flexibility indicator, suggesting that the limitation is not only in customer service, but in the way the company, as a whole, manages production changes.

In general, it can be seen that the comments reveal different perceptions of the same aspects: while some customers value communication and response times, others identify them as weaknesses. This discrepancy demonstrates the need for greater standardization and formalization of processes to ensure that all customers experience the same level of quality. In this sense, the needs identified throughout the analysis such as information management and centralization, process formalization, interaction history, automation, and alert management are fundamental to making processes faster, more consistent, and more effective. Together, they contribute to improving customer relations and reducing discrepancies in the perception of the service provided.

Opportunities for improvement

Most of the improvements pointed out by clients coincide with the weaknesses already mentioned, especially in aspects related to response times, flexibility, and communication.

One customer specifically highlighted the need to strengthen documentation: “Documentation could be improved (signature of client should be mandatory for validation activities).” This observation converges with the difficulties reported by managers, who often need to manually confirm whether a document has been sent or validated, even creating informal strategies such as adding notes to email titles or reviewing the same files more than once.

This point reinforces the importance of formalizing document procedures and introducing automated validation mechanisms, reducing dependence on manual checks and ensuring greater reliability and transparency in customer communication processes.

4.5 Summary of Results

Across the board, the integrated analysis of all sources of evidence analyzed (interviews, direct and participant observation, internal documentation, and satisfaction survey) made it possible to triangulate the results reinforcing the relevance of the needs identified throughout the research. Among these, process automation and information management and centralization stand out, as they proved decisive in the perceptions of both managers and customers. The need for a structured interaction history, the formalization of processes, and the management of alerts and performance indicators also emerged as priorities, highlighting the convergence between the different perspectives collected.

The satisfaction survey, in particular, provided access to customers' direct perceptions, complementing the information obtained from managers and validating most of the needs identified in other sources. Although most of the assessments were positive, especially compared to previous years, there are still weaknesses that affect the efficiency of processes and customer retention, with some expressing uncertainty about the continuity of the collaboration.

Therefore, while the company has shown progress, there is still significant room for improvement. Priorities relate mainly to communication consistency and the effectiveness of internal processes supporting customer relations areas that could be addressed through the future implementation of a CRM system aligned with the needs identified.

5. Discussion of Results

This chapter discusses the results of the empirical study in light of the literature, assessing whether the problems identified confirm, complement, or extend existing knowledge on B2B CRM and its implementation.

The discussion is organized by the needs identified in the analysis (Information Management and Centralization; Process Automation; Monitoring and Access to Indicators; Interaction History; Process Formalization; Alert and Reminder Management), relating the evidence collected to theoretical contributions and practical cases presented in the literature review.

5.1 Information Management and Centralization

Information management and centralization proved to be crucial in the data obtained, both in the interviews and in the satisfaction survey. The triangulation of sources, advocated by Yin (2013), highlighted converging problems: managers and customers pointed out that response times are hampered by the dispersion of information, which is fragmented across SAP, Excel files, and email exchanges. There is therefore a lack of effective data consolidation.

In the literature, Payne and Frow (2005) advocate the centralization of information as a critical success factor, including integrated data management among key processes common to organizations that adopt CRM effectively. The case studies analyzed confirm this view: problems such as data fragmentation, disjointed systems, and fragmented channels were reported (Kim et al., 2010; Bull 2003; Beldi et al., 2010; Torkzadeh et al., 2006).

Thus, it is clear that the dispersion of information is not only a local limitation of the company under study, but a general problem associated with the implementation of CRM systems. The need of information management and centralization is therefore a strategic priority, the resolution of which can ensure greater efficiency, speed, and consistency in customer relationships.

5.2 Process Automation

This need proved to be essential, as the data collected shows that managers face a high workload of manual tasks, such as confirming the uploading of forecasts and validating the sending of reports. These activities, which are often subject to oversights, end up generating rework and inconsistencies in communication with customers.

In the literature, Chalmeta (2006) emphasizes that CRM technology should enable the automation and optimization of service processes as a condition for achieving efficiency and reducing failures. Molnár et al. (2021) reinforce this view by pointing out that, in the B2B context, CRM should facilitate the response to the individual needs of corporate customers, automating tasks and reducing dependence on salespeople to organize data.

In the practical cases analyzed, this limitation was not reported as central, which can be explained by the fact that many of the organizations have already implemented automation mechanisms in their CRM systems. However, in the context of the company under study, this need stands out as a priority, as the absence of automatic workflows compromises overall efficiency and prolongs customer response time.

This study adds a pre-implementation perspective, foregrounding automation gaps as a primary bottleneck in contexts where CRM has not yet embedded workflows an underrepresented stage in case-based literature where automation is often already in place.

5.3 Interaction History

The data collected reveals the absence of a centralized record of meetings, emails, and calls, which makes it difficult to create an interaction history. Each manager organizes this information individually, using personal notes in diaries or scattered records in SAP. This situation further reinforces the need for the category discussed above, the management and centralization of information, since when data is integrated and accessible in a single location, the possibilities for accurate and personalized customer follow-up increase. Thus, it can be said that both categories complement each other.

These results are in line with the literature and the practical cases analyzed. Beldi et al. (2010) refer to the absence of a consolidated view of the customer, which led to a fragmented experience and difficulties in personalizing services. Torkzadeh et al. (2006) point out that customer contact channels were scattered, undermining both the experience and satisfaction of users.

Thus, it appears that this problem is not unique to the company under study, but is a recurring limitation in different organizational contexts, reinforcing the need to overcome this barrier by creating a centralized and accessible interaction history.

5.4 Formalization of Processes

Managers reported that critical situations, such as changes requested by customers, report management, or post-meeting procedures, are handled individually and without any standardization. There is no formal procedure that defines the best way to record and handle this information. The director herself pointed out that, in some cases, it is the customers who request the recording of meetings and then take responsibility for sending the recording to the company. The researcher also noted the lack of post-meeting minutes as a regular practice, which compromises traceability and organizational memory.

During the satisfaction survey, one customer suggested as an improvement the creation of more formal criteria for document validation, highlighting the external perception of the same weakness. It was also reported that critical information ends up being stored in a scattered manner: some managers file it in shared folders, while others simply mark it as important in emails. This excessive reliance on email as the main evidence creates significant risks, especially in situations where managers are replaced, when some of the information is lost because there is no clear documentation procedure.

This problem is echoed in the literature. Torkzadeh et al. (2006), in their case study on Merck-Medco, identified low compliance with standard operating procedures (SOPs) as one of the critical factors that undermined the effectiveness of CRM, reinforcing the need to formalize processes to ensure consistency and reliability. A similar pattern can be observed in the ELMS case (Bull, 2003), where CRM adoption failed due to over-reliance on technology and disregard for organizational change. Taken together, these examples highlight that CRM success depends not only on system implementation but also on the establishment of clear processes and organizational routines.

In this sense, the formalization of processes emerges as an essential need, allowing for a reduction in the dispersion of information, ensuring the traceability of interactions, and minimizing dependence on individual practices, thus guaranteeing greater consistency and confidence in customer relationship management.

5.5 Alert and Reminder Management

The data collected in the interviews revealed that managers use external tools, such as Teams and Outlook, to create reminders for deadlines or critical tasks. Although this practice helps to reduce oversights, it relies heavily on the individual discipline of each employee and does not guarantee consistency or information sharing among the team. In situations where managers

are absent or replaced, this informal approach compromises continuity and can lead to failures in the execution of important activities.

This limitation is closely linked to the need for formalization of processes, as discussed earlier, since critical tasks must be integrated into a structured system and not just depend on personal practices.

In the literature, although the practical cases analyzed did not directly highlight this need, it is plausible to assume that the integration of reminders and alerts was already contemplated in the systems adopted and therefore did not arise as an explicit problem. Chalmeta (2006), in turn, emphasizes that CRM must be a sufficiently sophisticated system to automate operations essential to customer service, which includes the implementation of notification and alert mechanisms.

The explicit need for integrated alerts/reminders surfaces here as a distinct requirement seldom isolated in B2B CRM literature, highlighting a practical lever to reduce human error and safeguard continuity.

5.6 Monitoring and Access to Indicators

The interviews revealed that performance monitoring in the customer service department is carried out only once a year, through a comprehensive satisfaction survey applied to all areas of the company. Managers reported that they do not have regular access to specific indicators of their work and expressed a desire for more frequent evaluations. According to them, this type of monitoring would not only allow for earlier identification of failures but also support self-assessment and individual development.

Customer perceptions in the latest survey confirm this gap: in areas such as response time, for example, opinions differed, with some evaluating it positively, while others pointed out weaknesses. More frequent monitoring could clarify these discrepancies, thereby facilitating the understanding of whether the problems are related to the individual performance of managers or to structural limitations of the process.

The literature reinforces the importance of this category. Chalmeta (2006) argues that a CRM system should allow, among other resources, the monitoring of the customer life cycle through the definition of specific KPIs. Similarly, Payne and Frow (2005) include performance evaluation as one of the five key processes common to organizations that are successful in adopting CRM.

Rahimi (2017), who argue that CRM success depends on the balanced integration of people, processes, technology, and culture. Without cultural alignment and user adoption, as observed in the case company, monitoring tools and performance indicators are insufficient to deliver strategic value. Annual, generic monitoring contrasts with the literature's emphasis on continuous, department-specific KPIs, indicating a concrete misalignment that this study makes visible.

In the practical cases analyzed, it was observed that all attributed great importance to performance indicators, especially customer satisfaction and service efficiency. This pattern confirms the need to strengthen monitoring in the context studied, since it is an essential element for real follow-up, for building trust with customers, and for promoting continuous improvement.

5.7 Summary of Discussion

The convergence between this study and the literature underscores the critical importance of the needs identified for the future implementation of a CRM system. Data triangulation (interviews, observations, internal documentation, satisfaction survey) validated these needs from internal (managers) and external (customers) perspectives, reinforcing the robustness of the conclusions.

Problems such as information dispersion, manual workload, lack of interaction history, absence of formal procedures, missing integrated alerts, and scarce specific indicators are recurrent across sectors (Kim et al., 2010; Beldi et al., 2010; Torkzadeh et al., 2006; Bull 2003), not peculiarities of this company. Theoretical works (Payne & Frow, 2005; Chalmeta, 2006; Molnár et al., 2021) also frame centralization, automation, KPI monitoring, and customer orientation as strategic pillars. Additionally, the theoretical literature (Chalmeta, 2006; Payne & Frow, 2005; Molnár et al., 2021) reinforces the relevance of these dimensions, describing information centralization, process automation, monitoring through KPIs, and customer orientation as strategic pillars of CRM.

The case of ELMS Ltd. (Bull, 2003) demonstrates how the absence of training, leadership commitment, and process formalization can transform CRM from a strategic opportunity into a source of inefficiency and competitive disadvantage. More recent contributions, such as Rahimi (2017), confirm that these factors remain decisive, emphasizing that CRM effectiveness depends on the balanced integration of people, processes, technology, and organizational

culture. Taken together, these insights reinforce the critical importance of the needs identified in this study, since overlooking them can undermine the very objectives that CRM is intended to achieve.

In this sense, it can be concluded that the needs for information centralization, process automation, interaction history, process formalization, alert management, and indicator monitoring are essential for future CRM implementation. Their absence is associated here and in the literature with operational issues and customer dissatisfaction; their presence is an indispensable condition for a robust and effective customer relationship management system.

Taken together, the discussion clarifies the content of the first research question (what needs are essential) and outlines the mechanisms through which addressing them would improve customer relationship management. The explicit answers to the research questions and the verification of objectives are presented in Chapter 6.

6. Conclusions and Recommendations

This study aimed to identify and analyze the essential needs for the future implementation of a Customer Relationship Management (CRM) system in a B2B pharmaceutical company. From the triangulation of multiple sources of evidence: interviews, direct and participant observation, internal documentation, and the satisfaction survey, it was possible to establish a set of six priority needs that should guide the company's path toward CRM adoption: information centralization, process automation, interaction history, process formalization, alert and reminder management, and monitoring of performance indicators. These needs emerged consistently across different perspectives, confirming their robustness and reflecting structural challenges that compromise efficiency and the quality of customer relations. They also align with the literature, which highlights similar limitations in other organizational contexts, reinforcing the general relevance of the findings.

In relation to the research questions formulated at the beginning of the investigation, the results allow for clear answers. The first question, concerning the essential needs for CRM implementation was addressed through the identification of the six dimensions listed above, which represent critical requirements for a system capable of responding to the company's specificities. The second question, regarding how CRM can improve B2B customer relationship management was answered by showing that addressing these needs would reduce manual errors, ensure greater consistency in communication, accelerate response times, and strengthen customer satisfaction and loyalty, thereby improving the company's competitive position.

The objectives defined in Chapter 1 were also met. The general objective, which consisted of identifying the needs for future CRM implementation in a B2B pharmaceutical context, was fully achieved. The specific objectives were likewise accomplished: the study revealed the importance of centralizing and consolidating information to facilitate consultation and interaction management, demonstrated how the integration of customer data contributes to a complete and accessible 360° view, highlighted how automation and centralization reduce search times and rework, and confirmed the relevance of monitoring key performance indicators to evaluate and improve customer management processes.

From a practical standpoint, the study contributes by offering the company a roadmap of needs that should guide CRM adoption, enabling the prioritization of initiatives and the sequencing of implementation phases. From a theoretical perspective, it adds to the literature by emphasizing the importance of analyzing needs before system adoption and by highlighting

dimensions often underexplored in academic discussions such as the formalization of processes and the management of alerts which proved decisive in the real organizational context.

In light of these findings, several recommendations can be made. The company should adopt a CRM approach that is both individualized and collaborative, ensuring data integration while fostering communication across different customer touchpoints. The adoption process must be aligned with the organizational strategy, guaranteeing that improvements in customer management translate into tangible competitive advantage. It is also recommended to invest in training and awareness programs for employees, mitigating resistance to change and promoting alignment between people, processes, and technology. Finally, the implementation of the CRM system should not remain restricted to the customer service department but should gradually extend to other areas, such as logistics, thereby reinforcing service consistency and internal coordination.

Despite the relevance of the contributions, this research has limitations. The satisfaction survey used was not designed by the researcher, which restricted the possibility of tailoring the instrument to the study's objectives. Moreover, it was not possible to follow the CRM implementation process in practice, which prevented empirical validation of whether the identified needs would effectively solve the problems described. Future research could therefore accompany CRM implementation longitudinally, allowing for the assessment of how addressing the needs identified in this study translates into improvements in efficiency, customer satisfaction, and competitiveness.

In conclusion, the study achieved its objective of identifying the essential needs for CRM implementation in a B2B pharmaceutical company. The evidence collected demonstrated that overcoming limitations related to information management, process automation, interaction history, formalization, alerts, and indicators is not only a condition for improving internal efficiency but also a strategic requirement for strengthening customer relationships. By addressing these needs, the company will be able to consolidate a more robust, consistent, and effective customer management system, capable of responding to market demands and ensuring long-term competitiveness.

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8. Appendices

Appendix A – Cases Analysis

Cases	**Fine Equity Bank (Kim et al., 2010)**	**ELMS Ltd. (Bull, 2003)**	**FX (Beldi et al., 2010)**	**Merck-Medco (Torkzadeh et al., 2006)**
Sector	Banking	Manufacturing	Telecommunications	Pharmaceuticals
CRM Objective	Develop customer-centric CRM to improve profitability and customer value management	Reverse company decline and regain competitive advantage	Improve customer experience, increase loyalty, and optimize responsiveness	Identify critical factors to improve CRM performance and acceptance
Issues prior to implementation	Lack of clear strategy, low management involvement, resistance to change, isolated systems	No clear strategy, fragmented departments, reliance on consultants, lack of training and change management	Disjointed systems, fragmented customer view, outdated processes	System complexity, process duplication, low compliance with SOPs, fragmented channels
Methodology	Qualitative: interviews and document analysis	Qualitative: interviews and documents	Qualitative: semi-structured interviews	Quantitative and qualitative: focus groups, surveys, factor analysis, and structural equation modeling
Team involvement	Top managers, sales, marketing, and IT departments	Managers in charge, internal teams and directors	Managers and employees, training, and cultural change management	Multidisciplinary: managers, analysts, operational teams

Cases	Fine Equity Bank (Kim et al., 2010)	ELMS Ltd. (Bull, 2003)	FX (Beldi et al., 2010)	Merck-Medco (Torkzadeh et al., 2006)
Process stages	Diagnosis, goal setting, CRM redesign, technological integration, continuous evaluation	Unplanned and improvised attempts; no structured phases or integration	Systems analysis, definition of requirements, team training, process adaptation	Problem identification, surveys, critical factor analysis, process redesign plan
Indicators used	Customer Lifetime Value, retention rate, satisfaction, profitability by segment	No formal KPIs; evaluation based on perceived performance and customer feedback	Customer satisfaction, channel integration, personalization, operational efficiency	User perception of efficiency, compliance, responsiveness (non-traditional financials)
Main results	Improved loyalty, channel integration, customer-oriented culture	CRM aggravated inefficiencies, generated resistance, and led to customer loss and reduced competitiveness	Improved channel integration, personalized offers, operational efficiency	Identification of failures, reinforcement of training, alignment between technology and processes
Challenges identified	Resistance to change, complex integration, internal technological limitations	Lack of leadership commitment; insufficient training and user adoption; over-dependence on technology providers; cultural resistance to change; absence of clear processes and performance metrics	Initial resistance, complex data migration, need for continuous improvement	Resistance to change, lack of clarity in processes, management of large volumes of data

Appendix B – Interview questions

Dimension	Questions
Client Communication	• What are the main channels used to communicate with clients? • Do you usually record these interactions in any way? If so, where and how? • What type of interactions would you like to be automatically recorded in the system (e.g., emails, meetings, calls)? • Do you find it difficult to locate email exchanges or communication history with clients? • Do you consider it important to have a centralized communication history?
Client Information	• What type of information do you consider essential to always have available about each client (e.g., products, preferences, specific agreements)? • Is this information currently centralized or dispersed across several systems? • Do you find it useful to have a client profile with all the essential data in a single place?
Operational Management	• How do you monitor the status of orders and production for each client? • How do you manage situations of early deliveries, changes of destination, or logistical exceptions? Is this documented somewhere accessible? • Have you ever encountered situations where it was necessary to resend documents to the client because you were unsure if they had already been sent?
Forecast Management	• When you receive consumption forecasts from clients, how do you ensure they are correctly integrated into the system (e.g., SAP)? • Has it ever happened that these updates were forgotten or not uploaded?
Indicators and Performance	• How often do you review the performance of the relationship with your clients? • Do you have access to indicators such as response time, deadline compliance, complaint rate? • Do you believe it would be useful to consult service performance indicators in real time and not only at the end of the year?
Contact Management	• Have you dealt with changes of account manager on the client's side? How do you manage the transition of contacts and information in such cases? • Do you consider it important to keep a historical record of who the main contacts are for each client and the changes over time?
Alerts and Tasks	• Are there critical tasks (e.g., sending documents, updating specifications, preparing meetings) that you would like to have as automatic reminders?

Dimension	Questions
	• If there were a tool that created alerts for important dates (e.g., new artwork due in 3 months), would it be useful?
Suggestions	• What improvements would you like to see in the way we currently manage the relationship with clients? • If you could design an ideal functionality in the CRM, what would it do?

Appendix C – Systematization of Interview Responses

Evaluated Dimension	Manager 1	Manager 2	Manager 3	Manager 4	Director
Client Communication	Communicates mainly by email, records interactions in SAP, but reports difficulty in locating older messages.	Communicates by email and archives the messages considered most relevant.	Communicates by email, records information in OneNote and organizes Outlook to allow quick access to messages.	Communicates by email and uses Outlook flags to highlight important content.	Communicates mainly by email and records notes in an agenda.
Client Information	Considers agreements and orders as the essential information to always keep accessible for each client.	Values delivery plans for orders as the priority information.	Points out materials, products and client key contacts as essential information.	Considers it fundamental to have a complete client profile with all associated data.	Emphasizes the importance of key contacts, business area, supplied materials, payment terms and commercial conditions.
Operational Management	Monitors orders through SAP and reports provided by the planning department.	Monitors orders through meetings, verbal communication and planning reports.	Monitors through SAP and planning files.	Monitors through SAP and planning files.	Monitors entirely through SAP.
Forecast Management	Controls forecasts via email (read/unread messages) before uploading to SAP.	Ensures upload by visually comparing what is in SAP with the last forecast received from the client.	Marks emails with the indication 'upload done' to confirm that the forecast has been uploaded.	Places uploaded forecasts in a specific folder; if not there, it means they were not uploaded.	Not applicable.

Evaluated Dimension	Manager 1	Manager 2	Manager 3	Manager 4	Director
Indicators and Performance	Has no access to KPIs and considers annual surveys sufficient to assess performance.	Has no access to KPIs and considers annual analysis adequate.	Has no access but considers it important to consult KPIs weekly and in real time.	Has no access and considers quarterly monitoring of KPIs crucial.	Reports having daily inputs with clients and supports quarterly KPI management.
Contact Management	When there are manager changes, information is lost and must be retransmitted.	Similar situation: when the manager changes, it is necessary to explain again how the company works.	Has never experienced manager changes but considers it essential to have a historical record of main contacts and changes.	Has experienced manager changes and confirms the need to explain everything again.	Reports significant loss of information and constant need to recall rules when managers change.
Alerts and Tasks	Identifies the need for a tool to generate reminders.	Supports the use of a tool that creates alerts for deadlines.	Uses Outlook tasks as a reminder tool.	Uses Teams calendar to generate alerts.	Uses agenda and calendar to manage reminders.
Suggestions	Misses a structured record of interactions with the client.	Considers it essential to have access to the full history of the client and interactions.	Points out as essential a detailed client history to allow personalization of interactions.	Suggests creating a complete client profile including supplied materials and associated data.	Considers important that the SAP client plan is automatically updated with real-time data, since currently it is updated manually only once per month.

Appendix D – Coded Units

No.	Unit of Record	Assigned Code
1	Each manager has their own way of organizing emails, there is nothing centralized	Lack of centralized information
2	In addition to SAP they use an Excel database for customer profile management	Use of static manually maintained database
4	Emails, order records and customer contacts are what everyone would like to have automated	Need for a complete profile of the customer and their orders
5	There is difficulty in finding emails, because it is not standardized	Lack of procedures in email management
6	Missing a centralized history that allows information sharing not only by customer support but also by other departments	Lack of centralized history with customer interactions
7	Information available in SAP is scattered, different transactions are needed	Scattered information even within SAP
8	They track orders from multiple information sources	Multiple sources for orders
9	Order changes are all done in SAP but not documented, only left in emails as proof	Undocumented changes, dependency on email
10	Sending information is managed by manually checking if it has been sent or not	Manual validations required to confirm emails/documents sent
11	Forecast upload is done manually in SAP by each manager and verification if uploaded is also manual	Forecast is handled manually in SAP
12	Because certain validations are manual, managers end up forgetting if they already did them or not	Excessive manual processes sometimes lead to forgetfulness, requiring repeated validation
13	Evaluation surveys are carried out annually and cover all areas of the company	Satisfaction surveys only carried out at the end of each year
14	Managers do not have access to performance indicators	Managers do not have access to evaluations made by their clients in the survey
15	Most managers point out the need for more frequent satisfaction surveys	Greater frequency needed in client evaluations
17	When a manager is replaced, a lot of information is lost, especially emails	Information gets lost when a manager is replaced
18	They consider a history of interactions with clients crucial	Client interaction history is crucial for more personalized follow-up
19	Most use Teams and Outlook as managers of critical tasks	Teams and Outlook used as tools for reminders of critical tasks

Appendix E – Categorization

Table 1 – Categorization of Record Units

Unit of Record	Assigned Code	Group
In addition to SAP they use an Excel database for customer profile management	Use of manual/static database outside SAP	A
Emails, order records and customer contacts are what everyone would like to have automated	Need to integrate and automate customer profile	A
Sending information is managed by manually checking if it has been sent or not	Dependence on manual processes (sending, forecasts, validations)	A
Forecast upload is done manually in SAP by each manager and verification if uploaded is also manual	Dependence on manual processes (sending, forecasts, validations)	A
Reports extracted from SAP are not adapted, they still need adjustments before being sent to clients	SAP reports subject to manual changes before sending	A
Each manager has their own way of organizing emails, there is nothing centralized	Lack of centralized information	B
Information available in SAP about orders and clients is scattered, requiring different transactions	Dependence on multiple sources	B
They track orders from multiple information sources	Dependence on multiple sources	B
When a manager is replaced, a lot of information is lost, especially emails	Loss of information when managers are replaced	B
More client information that only finance has access to, such as payment terms	Need to integrate financial information into customer profile	B
Evaluation surveys are carried out annually and cover all areas of the company	Satisfaction surveys only annual and generalized	C
Managers do not have access to performance indicators	Lack of manager access to performance indicators	C
Most managers point out the need for satisfaction surveys to be carried out quarterly	Need for more frequent satisfaction surveys	C
Missing a centralized history that allows information sharing not only by customer support but also by other departments	Lack of customer interaction history	D
Most interactions with the client are done mainly by email, but we also hold periodic meetings in Teams; it	Lack of customer interaction history	D

Unit of Record	Assigned Code	Group
would be necessary to have a history of everything exchanged between us and the client		
There is difficulty in finding emails, because it is not standardized	Lack of procedures/documentation, email dependence	E
Order changes are all done in SAP but not documented, only left in emails as proof	Lack of procedures/documentation, email dependence	E
There are changes of manager on the client side that often force us to explain all the information again, as if it were the first time	Need to re-explain policies and procedures	E
Most use Teams and Outlook as managers of critical tasks	Use of Teams and Outlook as task reminders	F

Table 2 – Groups and Categories

Group	Category
A	Process Automation
B	Information Management and Centralization
C	Monitoring and Access to Indicators
D	Interaction History
E	Process Formalization
F	Alerts and Reminders Management

Appendix F – Satisfaction survey

Client	Assistance	Accessibility	Response Time	Flexibility
A	Very Good	Very Good	Very Good	Very Good
B	Very Good	Very Good	Good	Good
C	Very Good	Very Good	Very Good	Very Good
D	Good	Good	Average	Average
E	Good	Good	Good	Good
F	Good	Good	Good	Good
G	Very Good	Very Good	Very Good	Very Good
H	Very Good	Very Good	Good	Good
I	Average	Good	Average	Poor
J	Very Good	Very Good	Good	Good
K	Good	Good	Average	Very Poor
L	Very Good	Very Good	Very Good	Very Good
M	Very Good	Very Good	Very Good	Good
N	Good	Good	Good	Very Good
O	Very Good	Very Good	Good	Very Good
P	Good	Good	Average	Poor
Q	Good	Good	Good	Average
R	Good	Good	Good	Good

Client	New artworks implementation	Monthly material-customer inventories	Complaints treatment	Overall appreciation
A	Good	Good	Good	Better
B	Very Good	Average	Good	Equal
C	Very Good	Good	Very Good	Better
D	Very Poor	Average	Poor	Worse
E	Good	Good	Good	Equal
F	Good	Good	Good	Equal
G	Very Good	Good	Good	Better
H	Very Good	Very Good	Very Good	Better
I	Good	Poor	Average	Worse
J	Very Good	Good	Good	Equal
K	Average	Very Poor	Good	Equal
L	Very Good	Very Good	Very Good	Better
M	Very Good	Good	Very Good	Equal
N	Good	Very Poor	Good	Equal
O	Good	Very Good	Good	Better
P	Poor	Good	Good	Better
Q	Good	Good	Good	Better
R	Good	Good	Good	Equal

Client	Would you recommend our company?	Why?	Do you plan to continue using our services?
A	Yes	No answer	Yes
B	Yes	Good price/quality relation	Yes
C	Yes	No answer	Yes
D	No	Significant delays in product delivery and constant price changes	No
E	Yes	Very good communication and relationship	Yes
F	Yes	No answer	Probably yes
G	Yes	Service of excellence	Yes
H	Yes		Yes
I	No	Unjustifiable delays, bad communication, lack of flexibility and transparency	Probably yes
J	Yes	Friendly service and high-quality work	Yes
K	Yes	No answer	Yes
L	Yes	No answer	Yes
M	Yes	Very good communication with Quality, operations and supplies. Sometimes hard to obtain answers before monthly meeting	Yes
N	Yes	No answer	Yes
O	Yes	Product quality	Yes
P	Yes	No answer	Yes
Q	Yes	No answer	Yes
R	Yes	No answer	Yes

Client	Would you recommend our company?	Why?	Do you plan to continue using our services?
A	Yes	No answer	Yes
B	Yes	Good price/quality relation	Yes
C	Yes	No answer	Yes
D	No	Significant delays in product delivery and constant price changes	No
E	Yes	Very good communication and relationship	Yes
F	Yes	No answer	Probably yes
G	Yes	Service of excellence	Yes
H	Yes		Yes
I	No	Unjustifiable delays, bad communication, lack of flexibility and transparency	Probably yes
J	Yes	Friendly service and high-quality work	Yes
K	Yes	No answer	Yes
L	Yes	No answer	Yes
M	Yes	Very good communication with Quality, operations and supplies. Sometimes hard to obtain answers before monthly meeting	Yes
N	Yes	No answer	Yes
O	Yes	Product quality	Yes
P	Yes	No answer	Yes
Q	Yes	No answer	Yes
R	Yes	No answer	Yes