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# CRM SYSTEM IMPLEMENTATION

– Schneider Electric Finland's bFO / Salesforce  
Implementation



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# CRM SYSTEM IMPLEMENTATION

## - SCHNEIDER ELECTRIC FINLAND'S BFO / SALESFORCE IMPLEMENTATION

Companies aim to be customer focused today as it has been proved that the companies with satisfied customers are most likely the winners in a competitive environment. Customer relationships are valuable and it is worth taking care of them effectively. The CRM (Customer Relationship Management) systems are designed to provide a better customer experience.

The CRM system implementation will affect the company's processes and may even lead into organizational changes. In the case study discussed in the present master's thesis Schneider Electric Finland's Salesforce CRM system implementation, which started in Finland in early 2012, is analyzed.

The theory section discusses the factors affecting information system implementation and change management.

At the beginning of the case study, people from different business units were interviewed about their information systems and the way information was shared prior to Salesforce. In the next stage, a questionnaire with 27 questions was sent to all users after one year of using the product. The main goal was to help to boost the Salesforce utilization rate at Schneider Electric Finland.

Based on the answers to the questionnaire, proposals to the Entity Leader were made. The new actions based on the proposals have improved Salesforce utilization activity considerably. The findings of the study are supported by the theory. In conclusion, it was instructive to understand how important the role of people and strategy is in CRM system implementation.

**KEYWORDS:**

Customer relationship management, CRM system implementation

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# ASIAKKUUDENHALLINTAJÄRJESTELMÄN KÄYTTÖÖNOTTO

## - BFO / SALESFORCE -JÄRJESTELMÄN KÄYTTÖÖNOTTO SCHNEIDER ELECTRIC FINLANDISSA

Asiakkuuden hallintaa pidetään erittäin tärkeänä tekijänä liiketoiminnassa. On pystytty osoittamaan, että asiakkaisiin viisaasti panostava yritys on todennäköinen menestyjä. Asiakkuutta halutaan ylläpitää ja kehittää rationaalisesti ja järjestelmällisesti. Asiakkuuden hallintaan on kehitetty asiakkuudenhallintajärjestelmiä.

Asiakkuudenhallintajärjestelmän käyttöönotto vaikuttaa usein koko yrityksen prosesseihin ja jopa organisatorisiin järjestelyihin. Tutkin työssäni tapaustutkimuksena Schneider Electric Finlandin asiakkuudenhallintajärjestelmän käyttöönottoa. Asiakkuudenhallintaan oli valittu järjestelmäksi Salesforce ja sen käyttö aloitettiin alkuvuonna 2012.

Teoriaosassa olen paneutunut tekijöihin, jotka vaikuttavat informaatiojärjestelmien käyttöönottoon ja muutosjohtamiseen.

Varsinaisen tapaustutkimuksen aloitin haastattelemalla eri liiketoimintayksiköiden henkilöitä heidän informaatiojärjestelmistään ja niiden käyttötavoista ennen uuden järjestelmän käyttöönottoa. Varsinaisen käyttäjäkyselyn lähetin kaikille käyttäjille noin vuoden käyttökokemuksen jälkeen. Tarkoituksena oli auttaa Schneider Electric Finlandia asiakkuudenhallintajärjestelmän aktiivisen käytön lisäämisessä.

Kyselyn vastausten perusteella pystyin antamaan kehitysehdotuksia, joilla voitiin lisätä Salesforce-järjestelmän käyttöä. Kirjallisuus tuki tutkimustuloksiani kattavasti. Oli opettavaista huomata, miten tärkeässä roolissa ihmiset ja strategia ovat asiakkuudenhallintajärjestelmän käyttöönotossa.

ASIASANAT:

Asiakkuudenhallinta, asiakkuudenhallintajärjestelmän käyttöönotto, CRM järjestelmä

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## **LIST OF ABBREVIATIONS (OR) SYMBOLS**

bFO stands for Bridge Front Office: Schneider Electric is using bFO name for the Salesforce CRM system.

CRM stands for Customer Relationship Management.

Dashboard view is a people configurable view which could include a chart, drawings and numerical data concerning the business i.e. key performance indicators. In this view it is possible to see key performance indicators in an easily readable visual format in one view.

ERP stands for Enterprise Resource Planning.

Groupware product is a program that helps people located far away from each other work together collectively. The groupware services can include calendar sharing, e-mail handling, shared database access, display information to others and other activities. Well known examples of groupware are Lotus Notes, Microsoft Exchange and NetMeeting

Siebel is a brand name owned by Oracle Corporation. Siebel is Oracle's most complete CRM solution and it also includes modules for many other business needs.



# 1 INTRODUCTION

## 1.1 Purpose of research

With this research project I tried to help Schneider Electric Finland with its CRM system implementation. The main challenge was that the opportunities were not updated due to quite a low utilization rate. My aim was to find out which factors could help users to be more motivated and active in using the system.

The theory section examines which factors will affect information system implementation and change management. The theory is collected from literature and from the internet.

I made a questionnaire with Webropol to all system users. Based on those results I gave in mid February 2013 proposals to our Entity Leader on how Schneider Electric Finland would be able to increase utilization rate. The main factors were add trainings, change the organization to have local mentor persons, demonstrate system benefits to different user groups and make sure that the management is more committed to the implementation.

By implementing the above mentioned actions Schneider Electric Finland has been able to increase CRM system utilization rate significantly in half a year. I have personally learnt much about Schneider Electric Finland and information system implementation.

## 1.2 Schneider Electric

Schneider Electric is a global specialist in energy management. The history of Schneider Electric is in iron and steel industry, heavy machinery and ship building in the 19<sup>th</sup> century. Electricity and automation management became part of the strategy in the 20<sup>th</sup> century. Nowadays with operations in more than 100 countries, Schneider Electric offers integrated solutions across multiple market segments, including leadership positions in Utilities & Infrastructure, Industries

& Machines Manufacturers, Non-residential Building, Data Centres & Networks and in Residential. Focused on making energy saving, reliable, efficient, productive and green products, the Group's more than 140,000 employees achieved sales of 24 billion euros in 2012, through an active commitment to help individuals and organizations make the most of their energy. After year 2000 Schneider Electric has positioned itself in new market segments: UPS (uninterruptible power supply), movement control, building automation and security through acquisitions of APC, Clipsal, TAC, Pelco, etc. Schneider Electric is based in France and its stocks are traded on the Paris Stock Exchange. (Schneider Electric 2013)

### 1.3 Schneider Electric Finland

In Finland Schneider Electric business is divided in five business units which are Buildings, IT, Industry, LifeSpace, Power and Infrastructure as is presented in Figure 1. Buildings is the largest business unit responsible for energy management offered directly to end users. Building automation including heating, air conditioning, lighting, water consumption, etc. and optimization of the aforementioned systems is everyday business for Schneider Electric own specialists. Inside Buildings business unit there is also security and safety products with trademark Pelco which are sold through partner channels. (Schneider Electric-FIN\_yritysesitys2012)

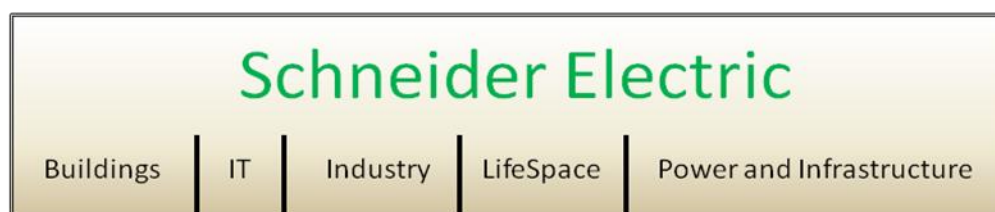


Figure 1. Schneider Electric business units.

The LifeSpace is manufacturing and selling Schneider Electric electrical components like switches and sockets through electricity distribution. Industry unit is selling contactors and other industrial components straight to large manufac-

turers and also through distribution channel. IT business unit is selling racks, cooling systems and UPS devices for data centres and smaller customers through IT distributors. Power and infrastructure is doing middle voltage which means 20 kilovolts business with their transformers and others devices. In Finland Schneider Electric has in total more than 1000 employees in 23 local offices around the country. (Schneider ElectricFIN\_yritysesitys2012)

#### 1.4 CRM and its system history in Schneider Electric Finland

The acronym CRM stands for Customer Relation Management. The technology is used to manage company's interactions with current and future customers. The aim is to develop an increasingly smart system with data where the customer is placed in the centre. The idea is to combine business with a fully supporting information system. The main elements in CRM system implementation are people, strategy and technology which can be divided in many smaller elements. The result of CRM system implementation for the business should be better customer experience and ultimately higher revenue. CRM system software could be web accessible through a web browser like Salesforce.

A small business CRM system may only consist of a contact manager system which integrates documents, jobs and scheduling for individual customer accounts. The focus is then on event management and relationship tracking (Wikipedia 2013). Typical users for CRM software in a company are sales, service & support, management and marketing. The users may want to see from CRM system different things or indeed same ones but from a different angle in their own dashboard views.

At Schneider Electric we had three different CRM systems in use before bFO Salesforce implementation. I have interviewed one or two persons per business unit about their information systems and the way information was shared before bFO. More detailed information about my interviews is presented in appendix 1.

The figure 2 describes the situation with different CRM systems per business unit and Schneider Electric's goal to start using only one CRM system bFO Salesforce.

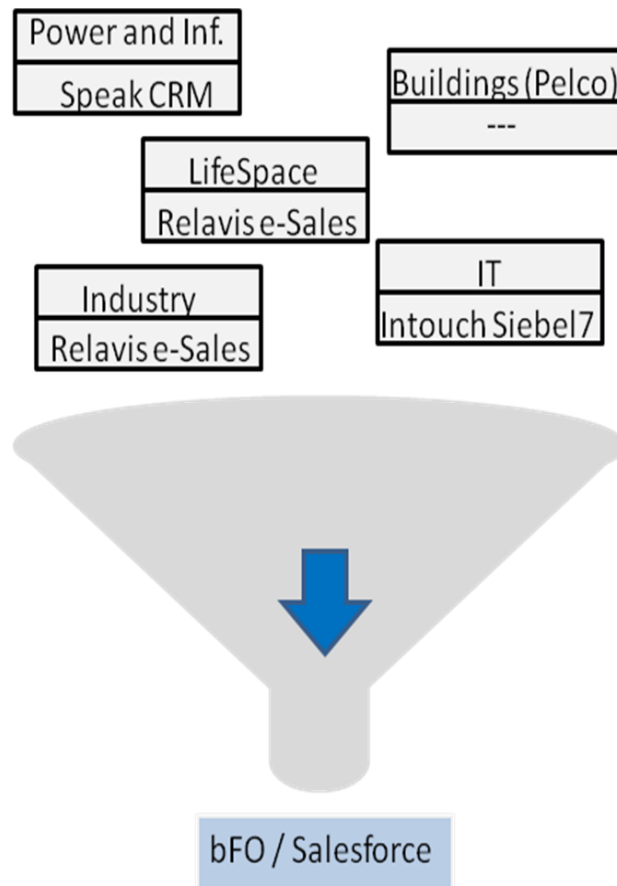


Figure 2. Schneider Electric CRM history by business unit and the flow towards one bFO Salesforce CRM.

### 1.5 bFO Salesforce CRM system

In Schneider Electric bFO stands for bridge Front Office. This name is used for Salesforce CRM system. The Salesforce is a well-known CRM system and one of the market leaders. It is well known for its cloud base database and web-based user interface. Salesforce was founded 1999 in San Francisco. It is a

public company which is currently estimated to be the most innovative company in America by Forbes magazine. (Wikipedia 2013)

## 2 CRM SYSTEM IMPLEMENTATION

### 2.1 Most common challenges and success factors in CRM Implementation

There are many challenges in CRM implementation project. Failure rates of CRM projects may be as high as 70%, as Mr Tafti discovered in 2002. In the TDWI Industry Study, 2000 it was found that 41% of the organizations with CRM projects were either experiencing difficulties or close to a potential flop. (Finnegan, David; Leslie P. Willcocks 2007, 42)

In following pages I will go through most common pitfalls and important elements in implementation by focusing on people and strategic issues but not on technology.

In a successful CRM implementation change management is necessary. Mr Price Pritchett (2005) listed the ten most common change management mistakes. They are presented in table 1.

Table 1. 10 most common change management mistakes

|   |
|---|
| <p>1. Starting too late</p> <p>This is the most common fundamental error because people feel that waiting will provide more information for a better decision. In the majority of cases, time is your number one enemy!</p> |
| <p>2. Moving too slowly</p> <p>Organizations do not need consensus to proceed, just consensus for goals. Speed to add value is critical to success.</p>   |
| <p>3. Lack of a coherent, well-conceived change strategy.</p> <p>Bad design will doom your change effort into failure.</p>  |

(continue)

Table 1 (continue)

|  |
|--|
| <p>4. Failure to apply project management techniques</p> <p><i>“Ignore good project management, and your people will end up just muddling along.” (Prichett 2005, 1)</i></p>   |
| <p>5. Using the wrong indicators to measure progress</p> <p>Managers should not be scared off drops in attitude when a major change is under way because often negative signs could indicate the right things are being done</p>       |
| <p>6. Not giving people the know-how they need.</p> <p>Change means new learnings and that means new trainings.</p>  |
| <p>7. Failure to take care of the “me” issues</p> <p>If employees are not sure of the effect on them personally, they won’t accept the change as positive. It is also easier to not support than support a very ambiguous project.</p> |
| <p>8. Not altering the reward system to support change</p> <p>Does the company want to end up paying those employees who resist change? Usually current reward system maintains the current situation not the new one.</p>             |
| <p>9. Flawed communications</p> <p>Good communication means honest discussions with the right people at the right time and those moments keep a change effort alive</p>  |
| <p>10. Lack of leadership</p> <p>If the change effort lacks committed leaders, who are not afraid to implement the change through the resistance towards a set goal, the change will most probably fail.</p>                           |

Mr Sudhir (2005) listed the following important components for change management especially when implementing CRM system:

- selling change
- creating change infrastructure
- training
- reconfiguring organizational structure and performance assessment
- remolding incentive systems

Mrs Schwartz (2012) pointed out two things which are the most important elements in CRM implementations:

#### Education

- focus on how the change will benefit employees' professional lives

#### Incentives

- for example a salary boost, bonus or threat of losing job

Mrs Orlikowski's study (1992) suggests that cognitive and structural elements will have significant effect for the adoption, understanding, and early use of the new groupware product. Cognitive related findings are collected in Table 2 and structural elements findings are in Table 3.



Table 2 Cognitive elements and proposals on how to help adoption

| <b>Findings concerning people's cognitions or mental models about technology and their working attitudes</b> |  |
|--|--|
| People may be overall skeptical about technology.  | People's beliefs of technology should be often adjusted to accommodate a new technology. |
| Doubts about the value of a groupware product for their firm's performance.                                  | More communication about groupware and trainings are needed.                             |

Table 3 Structural elements and proposals for easy adoption

| <b>Findings concerning structural properties of the organization such as policies, norms and reward system</b>  |   |
|---|---|
| People may be unwilling to spend time learning or using CRM system, if nonchargeable hours are not allowed.   | Reward system should not be an inhibitor for system implementation.   |
| Very competitive culture may lead into a situation where people are not willing to share information or their expertise because it could give them an edge. | Group trainings could be a first step to create a more interactive and open culture. The competitive and individual rewarding culture needs to be changed so that groupware product will be used cooperatively. |

(continue)

Table 3 (continue)

|  |  |
|--|--|
| The lack of explicit procedures and policies concerning the use of software and responsibilities may cause a broad range of work practices and lower motivation in the early phase of system implementation. | New work practices are needed.   |
| The lack of system knowledge may cause concerns about own liability and data security  | More trainings and communication about the product and usage of it are needed. |

In Mr Ramaseshan's and Mr Mattsson's study about CRM implementation in Scandinavian business (2007) pointed out the following issues:

The most important issue is the role of top leadership in the implementation. Senior management should monitor and control the implementation process.

The second most important issue is motivation of employees to support the CRM implementation process. New system implementation requires extra efforts from the employees which will later on realize good returns.

Other important issues are: To position CRM system as a new element which helps company to serve customers effectively and to see it as a dynamic process where the data need to be continuously updated. In addition the customers should be motivated to give valid information to CRM system on a regular basis.

## 2.2 Technology in CRM

CRM system software could be a ready-made, tailor-made or totally custom-made software package. Important issues in software is easy access to the system, good usability and low latency, security, backups, the product's life cycle, integration ability and product support.

Easy access to the system could mean web access through a web browser, database would be in the cloud. User interface should preferably be logical and easy to use. Data security is an important issue because customer information is definitely worth of money. Database backup or having information stored in different servers is essential, because users need to have access to the system everyday and data is to be continuously refined. The product's life cycle is good to know when choosing a suitable CRM system because it could be expensive and time consuming to train the whole organization first to use one system and after two years another one. Integration ability and readiness and also product support are something to be clarified when choosing the right CRM software for the organization. The new CRM system should naturally be in some way better than the old one and the strengths should be "shouted out loud" to the new users.

## 3 RESEARCH IMPLEMENTATION

### 3.1 Research questions

In my research I ask quite a many how and why questions. This is very typical for a case study (Ylin, Robert K. 2009, 9).

My main research question is:

How to increase utilization rate in bFO?

My additional research questions are:

Why to use bFO? / Why not to use bFO?

How to use bFO?

What are the weaknesses- / development needs in bFO and what are the strengths of bFO?

Why bFO system users are not very active?

According to my hypothesis our CRM system users have not been trained enough to use new bFO/Salesforce system.

### 3.2 Research method

I have chosen an explanatory case study as my research method in order to find out why in the case company -Schneider Electric- CRM system utilization rate is quite low and how they could help users to be more active with bFO CRM system.

The unit of analysis consists of all Schneider Electric bFO/Salesforce users in Finland. I will analyze the collected data qualitatively.

A case study is an empirical inquiry that investigates a contemporary phenomenon in depth and within its real-life context (Ylin,Robert K. 2009, 18).

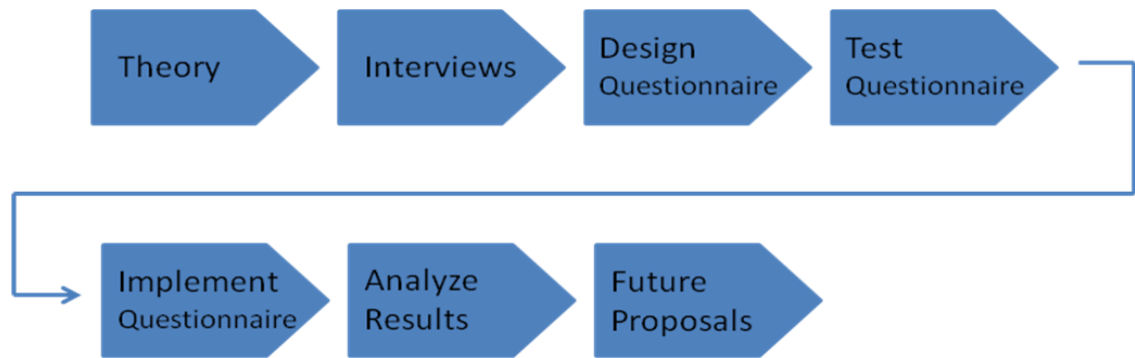


Figure 3. My CRM research implementation phases.

As is presented in figure 3 the first step was to do personal interviews in order to gather information about the types of information systems each business unit had used before bFO implementation. I strongly believe that interviews were a necessary basis for a good questionnaire.

### 3.3 Personal interviews on Schneider Electric CRM history

I started doing personal interviews about information system at Schneider Electric Finland in August 2012 and it took around 6 weeks to have the work done. The most interesting and developed information systems were in IT business unit. It was nice to see how they were able to generate quote with graphical system design tool and automatically got the information to their Intouch CRM. The Buildings unit was missing a CRM and they were using Navision ERP; Security (Pelco) business was using Baan ERP. LifeSpace and Industry business units were using Relavis e-Sales and Power and Infrastructure business units used Speak CRM but all three units were using SAP ERP. A clearer picture about CRM history in Schneider Electric before bFO Salesforce is easy to get from figure 2 on p. 12. For emailing Buildings unit is using Microsoft Outlook and all the other units are using Lotus Notes.

### 3.4 Questionnaire on the new CRM system implementation sent to all users

I made an anonymous email questionnaire by using Webropol survey software. My first query email was sent on 11 December 2012, the reminder on 18<sup>th</sup> December and the last reminder on 2 January 2013. Sent emails are in appen-

dix 2. The questionnaire ended on 4 January in the afternoon, so the users had more than 3 weeks of answering time. I used this kind of a bait in my emails: “By taking the survey you will also participate in the draw of Lindt chocolate”. Some of my colleagues asked how it was possible to win a chocolate prize in an anonymous survey. I solved the problem by randomly picking up users’ names from a list and making phone calls to chosen ones and asking something about the questionnaire. I had to make 13 phone calls before I was able to find three persons who had answered to the questionnaire and were able to be the lucky winners of 1 kg of Lindt chocolate.

My questionnaire included 27 questions and the template is presented in appendix 3. I had divided questions in four main parts: basic information, training and motivation, usage and program evaluation.

### 3.5 Background information on the bFO implementation

The bFO system was introduced on 16 January 2012. Before this date 9 persons were trained in France to be champion level users. Their first task was to give basic bFO training with the test database during the week 52 in 2011 and during the first and the second week of 2012 . The main sponsor for the bFO system was the Buildings business unit Sales Director and the process advocat was the Country President. The duties of the whole organization are described in Figure 4, p. 23. bFO software was part of One Company Program inside Schneider Electric. Somebody / a team in France just chose a Salesforce product for all Schneider Electric business units. In one e-mail there was a slide show about bFO and its four benefits; real-time collaboration, common database with faster and better visibility, enabling more effective customer functions with task lists and history information and easy real-time decision support. bFO has also been mentioned in the employee quarter info in Helsinki.

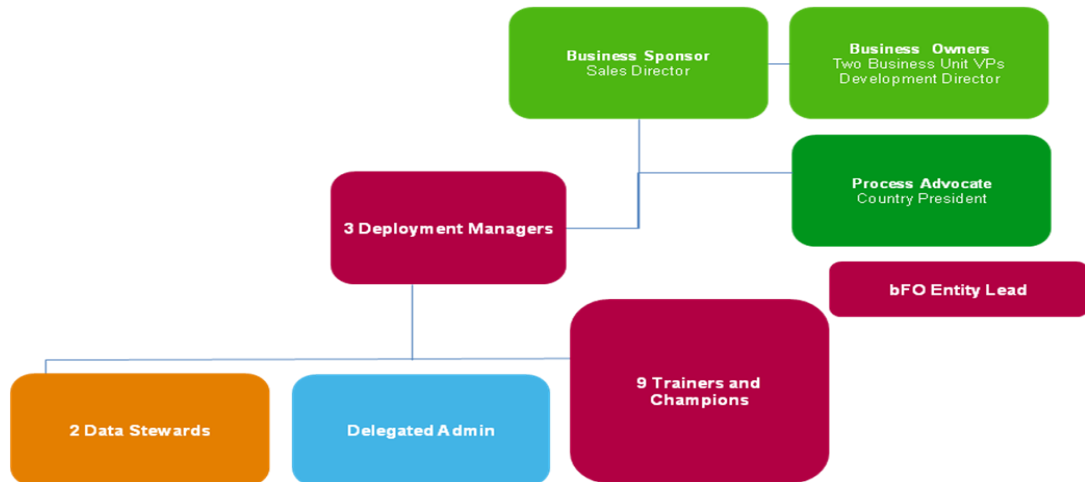


Figure 4. bFO Implementation organization in Finland

Around five months after the implementation we were in the following situation: Finland as a country was one of the five worst countries in Europe the checked opportunity up-dates in bFO database and users' weekly login activity to the bFO was around 50%. In Europe we had about 30-35 countries in different phases of implementation. I really wanted to help Schneider Electric to find out why our bFo users are not very active and how we could be able to have better utilization rate in bFO system.

### 3.6 Research validity

Finnish people are very honest and straightforward when asked for their opinion in the surveys. My questionnaire was sent anonymously to all users, so I truly believe on the study results. It was great to see that the answering rate was quite high - around 52%- because the topic was so actual and hot. I have been able to get answers to my research question. My study is only a single-case study, so the findings can not be generalized. All the collected data is stored to Webropol survey tool.

## 4 RESULTS

### 4.1 Results from the Questionnaire

I send a questionnaire to 211 e-mail addresses in Schneider Electric Finland and I was able to get 109 answers. This means that the answering rate was around 52%. bFO Salesforce was a very hot topic inside the company and I timed my questionnaire before and after Christmas holiday season, so that there was plenty of answering time.

#### First: answers concerning training

52 out of 109 have been only once in bFO training. Around 46 % are able to generate reports but only 25 % are able to generate reports to their needs. It was mentioned that the weakest feature in bFO is lacking of good views (question 23 in the questionnaire). Around 40% of the users would like to have more training for daily input routines and outlook integration and 64% would like to be more skilled and trained in reporting. My suggestion is that we should organize more training for bFo users.

#### Secondly: answers concerning motivation

9 out of 109 answered that they are very motivated to use bFO and 47% of all users are somewhat motivated to use the system. Figure 5 shows that 2/3 of the users who answered have been forced to use the system or that there was nothing in particular that motivated them.



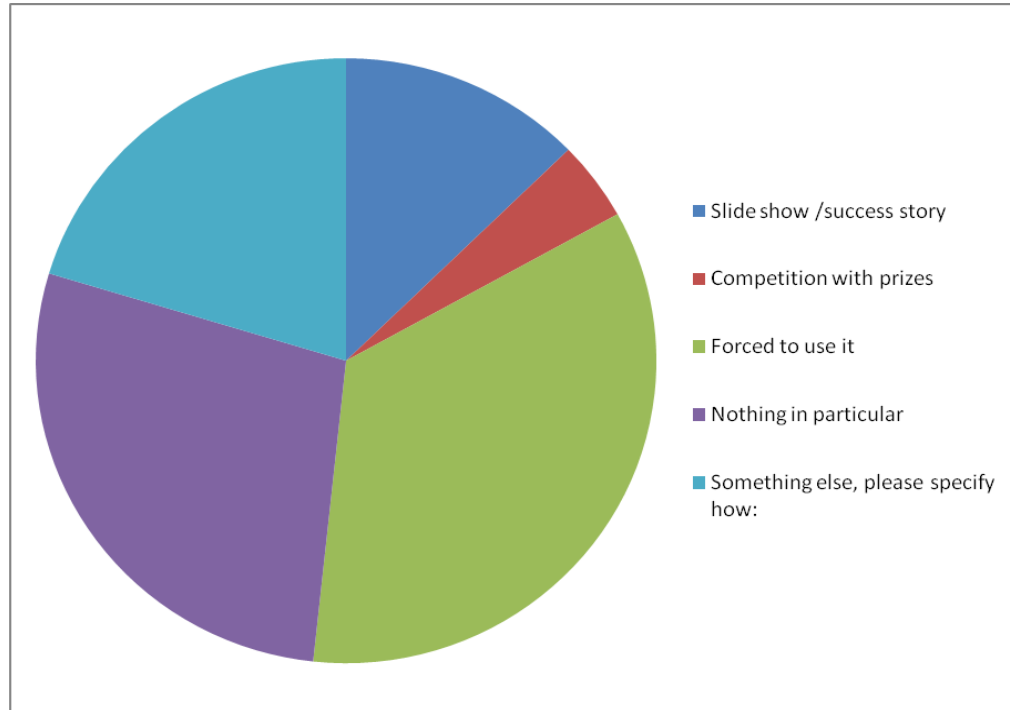


Figure 5. What motivated employees to use bFO –pie.

In the “Something else, please specify how” section the example answers to the motivation question were:

“Customer knowledge”, “Customer history”, “Transparency”, “Helpful for daily work”, “It’s my job”

I suggest that we could find important arguments for different employee groups like salesmen, bidding team, professional services etc. and show why bFO is a handy tool for them and why using it is important for all of us in the future. I would like to say that bFO users do not clearly understand how they would benefit from the system in their everyday job and on the enterprise group level. For the open question: “How do you personally benefit from the bFO system?” I got 45 answers including 11 negative statements like “Do I?”, “Take’-s away valuable face time with clients”, “I don’t benefit at all”. Example cases could be helpful and describe benefits for each department.

9 persons out of 109 do not use bFO and 4 of them are still using the old system. 15% of women do not use bFO. All in all there were only 13 women, who answered.

In figure 6 we see that about 30% were happy with our system start-up. Also system champions who were giving trainings answered this question. 23% were not satisfied and 47% had a neutral opinion about the start-up.

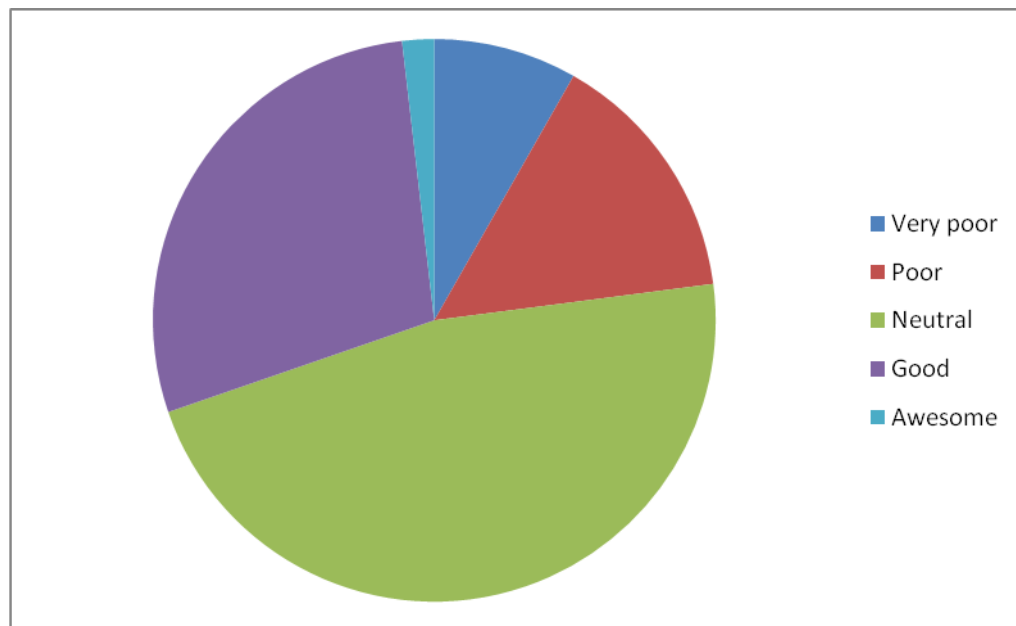


Figure 6. Description of our bFO system startup so far.

When I asked what factors could help employees to use more bFO (Question 16 in the Questionnaire) I got the following answers:

|                               |                                       |
|-------------------------------|---------------------------------------|
| The most important factor:    | Mentor person                         |
| Second most important factor: | Understand significance of bFo system |
| Third most important factor:  | Feedback                              |

In the “And If something else, what factor would help ” section example answers were: “Management should show that they are using it”, “Finnish language” and “Guidelines how to use it”

My proposal is that local mentor persons could help people to use bFO because it could be easier and quicker to ask help from somebody in the same office than e-mail to a busy person somewhere. Also feedback e-mail should include information on how the user could do things better or where the user could ask for help. Undefined feedback was not felt to motivate to use the system.

### Usage

Figure 7 describes how people are using bFO system. About 20% of the users are actively using reports.

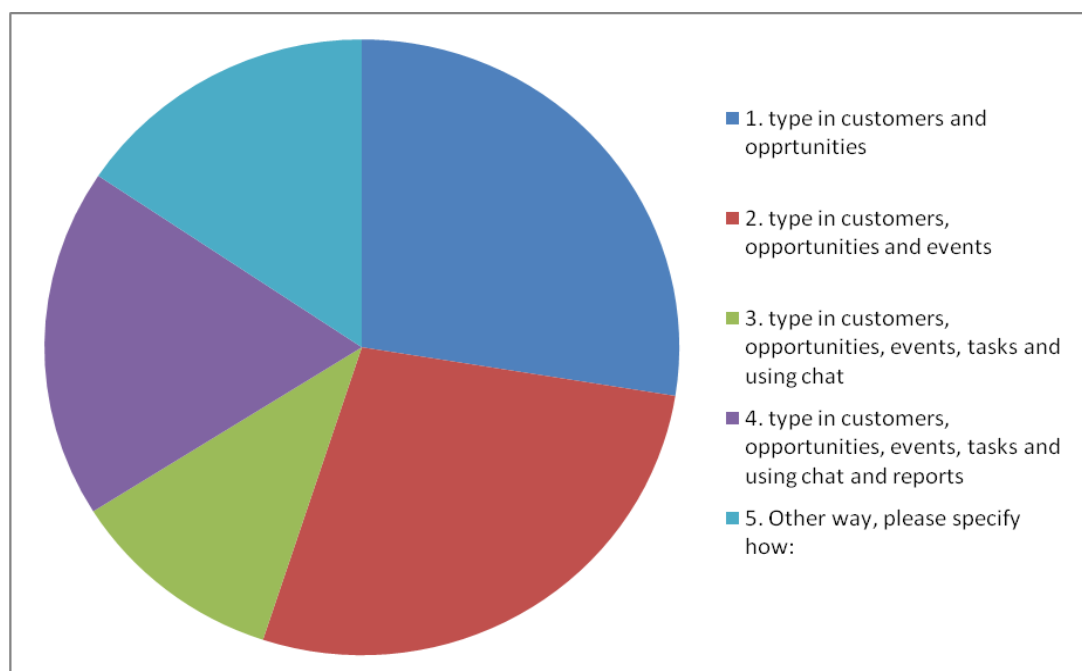


Figure 7. The way employees use the bFO system.

From the reports the user could easily see a summary of activities, forecast and plan future. I could not find any notable differences in bFO usage between different business units.

### Program evaluation

The questionnaire results of Question 21 show that the strengths of bFO Salesforce are easy access to the system and visibility throughout the corporation. On a scale of 1 to 5 easy access got 3,6 and visibility got 3,5 in average. It was

also mentioned in an open field that it is “easy to find all customers and their contact details” and “user is able to see who has contacted a certain customer”.

Future proposals for program evolution are Finnish language, enabling working in offline, easier sign-in process and to have a place where to upload opportunity related documents and e-mails. Users would also like to get rid of data fields which are not in use meaning that input fields should be deleted enabling simpler user experience. Lotus Notes synchronization should work properly.

It was mentioned in the open fields that when implementing new features practical guidelines should be given beforehand and not when already in use.

I got only two answers claiming that Relavis e-Sales was easier with contacts and activities and more locally adapted. One person stated that he has been using really nice “tailor made” CRM system software in the past which was really good. Two persons were happier with the CRM software including Finnish user interface. All the other users out of 109 were saying that bFO Salesforce is the best CRM system they have ever used.

#### 4.2 Research question perspective and my future action proposals

My main research question was: How could we be able to have a better bFO utilization rate? And here is a summary of my proposals for our new fulltime bFO Entity Leader:

- It could be very useful and motivating to explain why using bFO is important for the person, department and enterprise group in question. To the question “How an individual would benefit from the use of bFO”. 9 persons out of 109 answered that they are very motivated to use bFO.
- A local mentor person could help people to use bFO. One mentor person per regional office would mean easy and fast access to help.
- I suggest more trainings for Input routines, Outlook integration and reporting because around 40% of the users would like to have more train-

ing for daily input routines and Outlook integration and 64% would like to be more skilled and trained in reporting.

- The management should use the system and show an example for other users. If management will underestimate the value of the change and not start using the system, the result will be that people under them will neither.

My other research questions were:

1. Why to use bFO? / Why not to use bFO?
2. How to use bFO?
3. What is bad / need development in bFO and what is good in bFO?
4. Why our CRM system users are not very active?

For the first research question I got answers as is shown in figure 8.

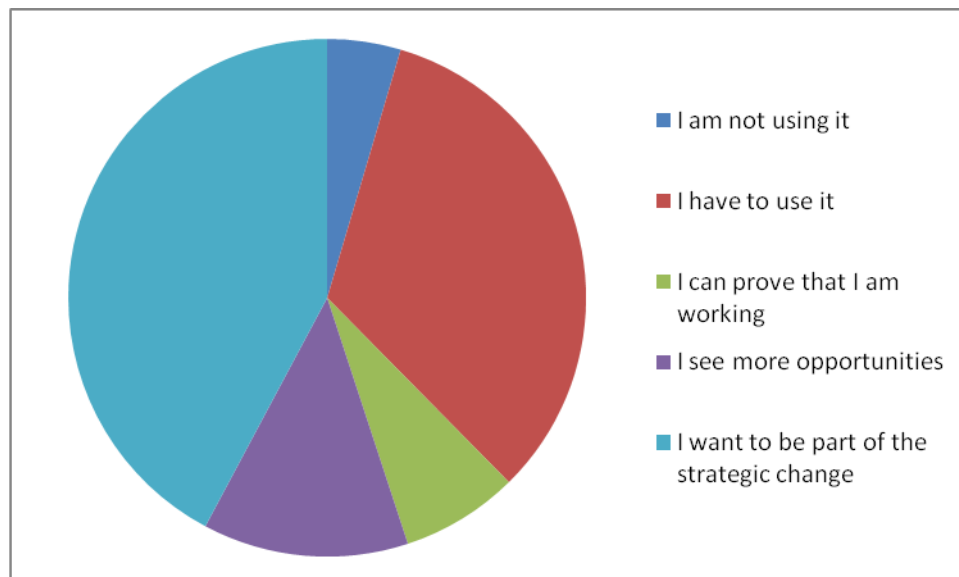


Figure 8. Reasons why people are using bFO:

And for the question “why not to use bFO?” I got the following answers:

- 9 persons out of 109 do not use bFO
- 4 persons are still using the old system
- 4 persons stated that they do not need it
- 1 person was not able to login to the system

The way users are using bFO I have described in Figure 7. Different ways of using the system are affected strongly by users' professional role and skill level.

The answers for the third question about system development proposals and what has been seen as good features I have listed in p. 27-28.

For the fourth question about low activity level I will list following findings:

- Low motivation to start actively use the system
- Personal benefits from the system unclear
- No clear instructions how to feed in data
- System usage skill level not high enough
- Not easy to get support
- Missing local language
- Integration to email is missing

My hypothesis; CRM system users have not been trained enough is valid and the training related results are in chapter 4.1 "Results from the Questionnaire". I have been able to find answers to my research questions with the questionnaire.

#### 4.3 Information perspective

I conclude that my findings are reliable. I have given the list of my future proposals based on this survey to the new Entity Leader in February 2013. He was

very keen to have my proposals and happy about the survey. Afterwards the Entity Leader has done following changes:

- Added trainings
- Changed the organization to have mentor persons in regional offices
- Tried to discuss bFO arguments with users in trainings. For example Customer Service thought that bFO is only a tool for management to control employees' work input. The real benefit for a sales person is to see before a customer visit why their customer has contacted Customer Service and how we could serve the customer in a better way and be really customer focused.
- Discussed with management about their important role in the change process

At the beginning of October 2013 Schneider Electric Finland has been able to raise the weekly login activity to the bFO to around 70% level which means 40% increase in activity.

I still wanted to interview at the beginning of October 2013 the former Entity Leader about our bFO Salesforce implementation and ask what he has learned from it. Here are the main points from the interview:

Do the implementation fast. Management should use the system and show an example to other employees.

Feed in only valid data to the new database and try to have it in a right format already at the beginning. A CRM system will not improve invalid or wrong data.

The rules how to use the system should be defined before the system is online. It is quite un motivating to do everything once and then fix afterwards.

There should be one person responsible for the CRM implementation and the person should have enough resources to manage the project. To have an understanding of information system implementation pitfalls and benefits of the selected system and also to have enough capacity i.e. time and be willing to succeed are important elements.

The things the former Entity Leader' mentioned are surely important points when doing information system implementation. Naturally next time the leader will be more experienced and skilled. I was happy to hear him – as an insider-confirm issues that I had found as an outsider doing the survey. Also literature will support his views as it is easy to see from the next section.

#### Results vs. literature

In Table 4 presented on the next page it is clear that many of my findings have been important issues in the research literature which concerns change management, CRM implementation and groupware implementation material.

I wanted to have a very clear and simple starting point to my survey and after reading books and research material about the topic I have been able to see many results from different angles. After that I started to think what elements are similar for each information system implementation and I was able to find three main elements people, strategy and technology. In Table 4 it is easy to see that people-related issues like motivation are important and strategic issues like amount of trainings, management commitment or instruction how to feed in data to the system are also important and that the research material is pointing it out, but how important is technology?



Table 4. Findings on CRM system implementation vs. research material

| Research Findings  | Findings Related to the Research Literature   |
|--|---|
| Motivation could be better, CRM system benefits for the user unclear | <p>Sudhir, H. Kale. Appreciating the Role of Change Management in CRM</p> <p>Schwartz, Karen D. Change Management   The Not So Secret Ingredient to CRM Success</p> <p>Orlikowski, Wanda J. Learning from Notes : Organizational Issues in Groupware Implementation</p> <p>Ramaseshan, B; Mattson, Jan. Key Issues in CRM Implementation : Some Evidence from Scandinavian Business</p> |
| Not enough trainings   | <p>Prichett, Price. The 10 Most Common Mistakes in Change Management</p> <p>Sudhir, H. Kale. Appreciating the Role of Change Management in CRM</p>  |
| Management commitment to use the new system was not 100%             | <p>Prichett, Price. The 10 Most Common Mistakes in Change Management</p> <p>Ramaseshan, B; Mattson, Jan. Key Issues in CRM Implementation : Some Evidence from Scandinavian Business</p>  |
| No clear instructions on how to feed in data                         | <p>Prichett, Price. The 10 Most Common Mistakes in Change Management</p>  |
| Easy and fast access to support is missing                           | -   |
| Program evaluation: Missing local language and Integration to e-mail | -   |

(continue)

Table 4 (continue)

## Lessons learned from the former Entity Leader

| Research Findings  | Findings Related to the Research Literature  |
|--|--|
| Implementation should happen fast  | Prichett, Price. The 10 Most Common Mistakes in Change Management  |
| Feed only valid data to the new system   | Ramaseshan, B; Mattson, Jan. Key Issues in CRM Implementation : Some Evidence from Scandinavian Business |
| The rules how to use the system should be defined before system is online                            | Orlikowski, Wanda J. Learning from Notes : Organizational Issues in Groupware Implementation             |
| Person responsible for implementation should have enough resources to manage the project             | Prichett, Price. The 10 Most Common Mistakes in Change Management  |
| Understanding of information system implementation pitfalls and benefits would be helpful for leader | -  |

I am certain that easy and fast accessible support will help in CRM implementation. Also information system implementation know-how could be very valuable when trying to reach preset implementation targets. An Entity Leader with aforementioned experience could be able to avoid common mistakes and turn project back on track in an early phase. I think that I have just been lacking literature which could support those two findings. A perfect program for 200 users is impossible to have but it is good to know how to be able to improve it. How much technology will influence the implementation and its' success is an interesting question. In my survey bFO users were very pleased of the software and the way it works. I assume that other programs could have been appropriate to Schneider Electric as well, since there are so many CRM system suppliers of-

fering quite similar features. Still it was nice to see how happy users were with bFO Salesforce system.

## 5 DISCUSSION

### 5.1 Summary

The case study includes the following parts: personal interviews per business unit in order to clarify what were the information systems in use before bFO/Salesforce; a questionnaire for all Schneider Electric bFO users after 11 months usage sent by using Webropol survey tool and a questionnaire template presented in appendix 3. The method used is a qualitative result analysis. The objectives was to find answers to the research questions and to test the validity of the hypothesis.

My main research question is how Schneider Electric could increase the utilization rate in bFO. The hypothesis was that system users are lacking trainings. More detailed statistics about training in chapter 4.1 “Results from the Questionnaire”. The summary of the proposals I made to the company is presented in chapter 4.2 “Research question perspective and my future action proposals”. Based on my proposals the CRM Entity Leader has implemented the following actions; added trainings, changed the organization to have mentor persons in regional offices, discussed bFO arguments by using real life examples and brought out the important role the management has as setting an example in the change process. As a result of the aforementioned actions, weekly login activity to bFO/Salesforce has increased at Schneider Electric Finland by 40%. Therefore I have been able to prove that my hypothesis is valid.

I also show in an easy format in Table 4 in which way the same elements that I used as a basis in my questionnaire findings and the Entity Leader’s interview are dealt in the research literature.

I would like to state that it is really important to find out which factors are causing low activity level in information system usage and after that fix those problems. I strongly believe that those factors are usually more related to people and strategy than technology and software features. Because I have used only

one case company I can not generalize my results to other companies. Also it is not easy and not the subject of this study to give a priority to factors which might jeopardize a CRM system implementation.

I am really happy that I have been able to help Schneider Electric Finland with its' bFO/Salesforce implementation and as I have mentioned the development of CRM system and its practices will continue. A CRM system is a dynamic process which will stay in a company.

## 5.2 Further research

I wanted to combine my case study results and the literature which I have used concerning essential CRM implementation elements to figure 9.

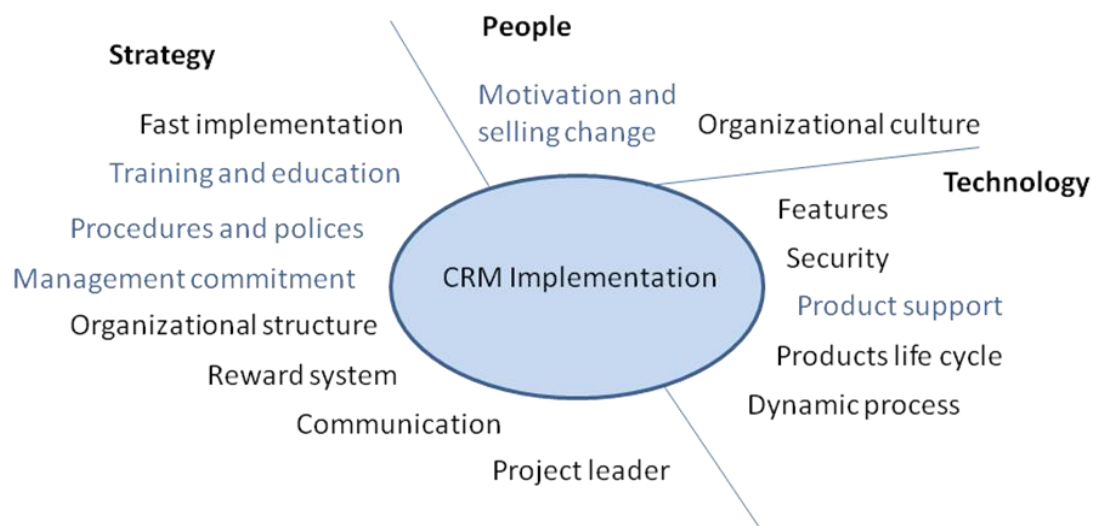


Figure 9. Important CRM implementation elements

I have marked with blue color the elements which in my opinion Schneider Electric Finland could have done better and then reach a better utilization rate. All the elements are divided in three different categories based on my knowledge. It could be interesting to analyze for example 20 different CRM implementation cases and see that the top 3 elements are usually the same ones. Then the project leader would be able to give priority to different elements.

Next I will shortly describe each element from figure 9.

Motivation and selling change means that users should be motivated in different ways to use the new system. Internal selling is a good idea to have in place because it will support the change effort and make new behavior start quicker. Some users could be overall skeptical about technology and they need strong facts to be convinced.

Organizational culture could influence a lot the implementation progress. For example a very competitive culture could affect negatively to implementation because information sharing will not take place. A CRM implementation requires changes in day-to-day activities but very often also changes will happen in corporate culture because the working method will be refined.

CRM software features like easy user interface, access and integration to the system will help implementation phase. The security should be in place and it should be communicated to the users that it will not be an open issue which could cause some users not to be willing to use a system.

Product support would work with different layers. First layer support persons could be found in a local office, second layer in the country administration level and the third layer would come from the CRM manufacturer side. The key issues in support are easy access and rapid answers.

Life cycle of product is an important element when choosing a suitable CRM system. Beta CRM software fits for somebody but not for all customers. It could be also very expensive to implement two different CRM systems in five years. Usually support will also fade when product will be near the end of its' life cycle.

A CRM system is a dynamic process which will stay in the company and practices will be developed during the life cycle. Implementation of CRM system is just one step and users should understand the whole system's nature.

A perfect project leader would be very experienced with information system implementation and a skilled change manager fully focused on implementation.

There is always communication but it could be wise to have a communication plan that some communication will happen all the time during the implementation. The communication will help change to happen and it will take the fear of the change away. Respecting people with right timing and a good story will effectively support implementation.

Reward system should be remolded to support new functions! It is a mistake if the system rewards individuals who are resisting the change.

Organizational structure is often changed or shaped to better support the new operation mode.

Management commitment which includes setting an example, monitoring and controlling is a key element for successful change. With successful change I mean change with right timing and results.

Procedures and policies how to feed in data and use the system are important to have in place as early as possible because it will be quite un motivating to correct the data afterwards.

Training and education are important issues because both will affect to user's motivation. It is important that the user understands how he will benefit from using the new system. In addition to that it would be good to understand how customer oriented data will serve different departments and the whole enterprise group. How often have you heard that there have been too many trainings in information system implementation?

With fast implementation I mean two things: If you have to change a process or a way of doing things it is wise to do it right away and not to wait for a better or safer system because usually when you are waiting you are actually giving competitors an edge. Another thing is that change process should happen fast because then you will have better chances to succeed. Also stakeholders or Vice Presidents prefer to support a project which will be implemented in a short time period and it could be easy to present some changes during the implemen-

tation which will support the whole implementation. Speed to add value is critical to success.

I have not mentioned IT infrastructure at all but of course it could influence the implementation. For example if a company has no servers at all it could easily choose a cloud based CRM system. If an infrastructure is not working well, it may jeopardize the whole implementation. If organizations have many different IT initiatives, they should co-operate rather than compete and thus avoid making troubles and delaying the change.

Performance of the CRM system could be difficult to measure. How to find an answer to the following questions: How much did our business grow due to the CRM system implementation? Can we justify the costs and resources used it took to start to use the new system? These are important questions but it is not easy to give an appropriate and detailed answer to them. Return on investment is a measurable monetary success and it can be calculated from company's financial statement. However, it could be very hard to separate the good performance created by the new CRM system from other business initiatives which have influenced good business results. My recommendation is to have measurable success factors before starting a CRM project. The success factors could be for example number of customer visits, margins, number of active customers, income per customer, increase in customer satisfaction. Still it will be a good guess to understand what was only CRM system's impact to good business result. The guess will be more relevant if success factors can be compared to the same factors in company's history before implementation.

In the near future there will be a new bFO questionnaire and I hope that it will be done by using my questionnaire template. It could be very interesting to compare the new results against mine and see if there is a lot differences in findings.



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## **Personal interviews about information systems with different business unit members concerning the time before bFO**

11.7.2012 **ITB** (APC) S.L.

Customer related information is in Intouch Siebel7 software. All projects, potential projects and **pricing** are included in the Intouch. Also **discount requests** are done through the Intouch software. All customer visits and phone calls are logged to the system.

Order handling is in Oracle and customer's purchases are visible through Cubes interface from Oracle database.

With Design Portal software which is a graphical design tool. The user is able to design data center projects including UPS, cooling, power distribution and rack systems. The software will **generate automatically quote to Intouch software**. Offers are sent to distributors or partners with Lotus Notes.

**Intouch to Salesforce but pricing is still in Intouch!**

18.7.2012 **Buildings Pelco** M.R.

No CRM system but separate access databases with customer information, weekly reports and a target log. The Baan is our production controlling system including invoicing. Separate offering and pricing software Eurostar. Offers sent to the partners with Outlook. Didiver interface for Baan database which enables easy access for orders, that have been invoiced and taken in.

**Salesforce replaced weekly reporting access database.**

26.7.2012 **Lifespace** (Power under 1000V) J.E. and K.Ö.

Lotus Notes with Relavis e-Sales for customer database and sales activities . Customer offers done with email or SAP. Offer will be identified by project offer number (SAP number or salesperson's number + year+ consecutive numbering). Offers to distribution partners or installation companies but products will go through distribution channel.

**Relavis to Salesforce!**

20.8.2012 **Industry** T.S.

Lotus Notes based Relavis e-Sales and all customer visits and calls to its database. Offers made with own templates and common naming structure (F and salesperson's number and year and consecutive numbering with three digits). The offers saved irregularly to network drive. Offers to distribution partners, installation companies and manufacturers but products will go most often through distribution channel. SAP ERP.

**Relavis to Salesforce!**

20.8.2012 **Power and Infrastructure** (more than ~1000V) A.P.

Areva used to use Speak CRM for opportunities and all the data have been transferred easily to bFO. Meetings and contacts were not marked up. All offers done with word or email saved to company server's folder. Offers sent to customers with Lotus Notes. SAP for production controlling system. Excel sheets and Web applications are used for marketing analysis and sales estimations.

**Speak CRM to Salesforce!**

27.8.2012 **Buildings** T.L. and A.A.

For economic and project planning Navision ERP in use. Excel sheets per salesperson including all customers and status and visiting dates. Invoiced sums easily per salesperson from Navision. Customer offers calculated with Promocalc which is linked to Navision database.

## All bFO survey emails sent

The first bFO survey email was sent on 11 December 2012 to all users:

Vastaa bFO Käyttäjäkyselyyn / Please answer the bFO Survey

Dear bFO user!

**Please answer the bFO Survey** and thereby

help us improve the system in the near future.

We really do respect your ideas which would help us to have bFO used more actively.

The survey is anonymous. Please answer also the open questions.

By taking the survey you will also participate in the draw of Lindt chocolate.

Have a great time with the Survey!

Br, Miika Havu

**Enter the survey here:**

<http://www.webpolsurveys.com/S/3C32972721901AEF.par>

An email reminder was sent on 18 December 2012 to all users:

Muistutus / Reminder: Vastaa bFO Käyttäjäkyselyyn / Please answer the bFO Survey

Thank you for those who have already answered to the Survey! This reminder does not concern you.

**Those who have not yet answered please go and answer the survey!**

**Please answer the bFO Survey** and thereby

help us to improve the system in the near future.

We really do respect your ideas which would help us to have bFO used more actively.

The survey is anonymous. Please answer also the open questions.

By taking the survey you will also participate in the draw of Lindt chocolate.

Have a great time with the Survey!

Br, Miika Havu

**Enter the survey here:**

<http://www.webpolsurveys.com/S/3C32972721901AEF.par>

Last email reminder was sent on 2 January 2013 to all users:

Muistutus / Reminder: Viimeinen mahdollisuus osallistua bFO Käyttäjäkyselyyn /

Last Chance! Please answer the bFO Survey

Thank you for those who have already answered to the Survey! This reminder does not concern you.

**Those who have not yet answered please go and answer because the survey closes on Jan. 4, 2013!**

**Please answer the bFO Survey** and thereby

help us to improve the system in the near future.

We really do respect your ideas which would help us to have bFO used more actively.

The survey is anonymous. Please answer also the open questions.

By taking the survey you will also participate in the draw of Lindt chocolate.

Have a great time with the Survey!

Br, Miika Havu

**Enter the survey here:**

<http://www.webpolsurveys.com/S/3C32972721901AEF.par>



25% completed (1 of 4 pages)

## Questionnaire bFO CRM-system

### Basic information

#### 1. Gender \*

- Male  Female

#### 2. Education \*

- Primary school  Vocational: Technical / trade school  College/High School  Polytechnic/UAS  University

#### 3. Business Unit \*

- Lifespace  Buildings  Power and Infrastructure  Industry  IT

#### 4. Position \*

- Employee  Supervisor  Manager  Director  Executive

#### 5. Job Description \*

- Marketing  Sales  Back office  Supervisor  Director





50% completed (2 of 4 pages)

## Questionnaire bFO CRM-system

### Training and Motivation

6. Have you been in bFO user training? How many times? \*

- 1 = once       2 = two to three times       3 = more than three times       4 = trainer myself       5 = not been in training

7. The training was enough for me. \*

- 1 = Strongly agree       2 = Agree       3 = Neutral       4 = Disagree       5 = Strongly Disagree

8. Would you need further training? In what field?

- 1 = Daily input routines  
 2 = How to find opportunities, etc  
 3 = Reports  
 4 = Integration to other systems  
 5 = Something else, please specify what:

9. What is your motivation level to use our new CRM system? \*

- 1 = Very low       2 = Low       3 = Neutral       4 = Motivated       5 = Very motivated

10. What motivated you to use our new CRM system? \*

- 1 = Slide show / success story  
 2 = Competition with prizes  
 3 = Forced to use it  
 4 = Nothing in particular  
 5 = Something else, please specify how:



75% completed (3 of 4 pages)

## Questionnaire bFO CRM-system

### Usage

11. Do you use bFO? \*

- 1 = I use it
- 2 = I do not have time to use it
- 3 = I am still using the old system
- 4 = I do not need it
- 5 = I can not login to the system

12. Why do you use bFO? \*

- 1 = I am not using it
- 2 = I have to use it
- 3 = I can prove that I am working
- 4 = I see more opportunities
- 5 = I want to be part of the strategic change

13. How do you use bFO? \*

- 1 = type in customers and opportunities
- 2 = type in customers, opportunities and events
- 3 = type in customers, opportunities, events, tasks and using chat
- 4 = type in customers, opportunities, events, tasks and using chat and reports
- 5 = Other way, please specify how:

14. How do you personally benefit from the bFO system?





100% completed (4 of 4 pages)

## Questionnaire bFO CRM-system

### Program Evaluation

21. What are the strenghts of bFO? \*

|                                       | 1 = Strongly disagree    | 2 = Disagree             | 3 = Neutral              | 4 = Agree                | 5 = Strongly agree       |
|---------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Easy access                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Easy to use                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Good support                          | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Visibility throughout the corporation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

22. If something else, please specify what are the strenghts of bFO?

23. What are the weaknesses of bFO? \*

|  | 1 = Strongly disagree    | 2 = Disagree             | 3 = Neutral              | 4 = Agree                | 5 = Strongly agree       |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Complicated to use                       | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Not good views                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hard reporting                           | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Offer calculation and pricing is missing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

24. If something else, please specify what are the weaknesses of bFO?

25. Have you used another CRM system and was it in some way better?



26. Do you have something else in your mind about CRM system or CRM implementation?

27. Have you got any suggestions how to improve our system in the future?

*Thank you for your participation and feedback, it's much appreciated!!*