Satakunnan ammattikorkeakoulu
Satakunta University of Applied Sciences

PUMTHONG-KARLSSON ALISA

CRM acquisition project for a small healthcare company

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Abstract

The motivation for the thesis was based on a real case for a small healthcare company, classified to be working in the psychologists' service field. The main task for the study was to provide a solution for the best suitable CRM software (Customer Relationship Management) and to research if it is possible to use a hybrid system, where a CRM system would be used together with paper-based patient documentation. A priority was also to put special importance on the ability of CRM software to handle data privacy information. The project work for the case, became an opportunity for the author to get a deep understanding of CRM software.

Evaluated data was collected from sources such as literature, CRM software provider information, interviews, user reviews, focus groups and usage data. According to the company's requirements, the goal was to research and compare different CRM software functionality and to then offer a solution for the client, on which software could be used, to best fit for a small healthcare company.

Three final CRM candidates' functionality was compared, and the result showed that one candidate (Pipedrive CRM software) was the most suitable, as it had important functionality such as sales, marketing, cloud-based technology and especially because of the built-in functionality for customer data privacy.

The thesis work delivered successful results, to help the client company make a right decision for choosing a CRM software. Pipedrive CRM software had all required functionality, which could help the client company to find new customers and to save cost and time by increasing work efficiency. It was also found that Pipedrive CRM could work as a hybrid system, as a combination of cloud-based technology and paper-based documentation.

CRM software, Customer Relationship Management, Healthcare company, Psychology, B2C, Laws regulation & Data privacy regrading customer care data.

CONTENTS

1 INTRODUCTION

In today’s business, it has become a trend for many businesses to make use of Customer Relationship Management software solutions. These are software to help the company manage the relationships between the company and their customers, in order to have a working profitable strategy that fulfils the client needs. In a small business, one question is also if it is worth it at all to take a CRM into use, if the benefits gained are worth the investment in time, money and other resources needed. In this thesis work, the theoretical information regarding CRM software is compiled from several different sources, to get different views on matters and a broad understanding of concepts of CRM. A good understanding of CRM software is helpful, so that it can be understood already before system implementation and integration if a CRM is the way to go and worth to invest in.

1.1 Background

In the beginning of the year 2020. The company “Psykolog Sabina Westerbäck” (A Healthcare Company for Psychotherapy) had the requirement for the thesis author to find out and plan for the company solutions, to upgrade their way of working from a paper-based customer information system to a modern CRM software solution. The planned work was to collect data and information from different sources, to compare, evaluate, and measure which software type that fulfil the company requirements.

During the time of research, Finland, like much else of the world, got affected by the Covid-19 a pandemic crisis. In this pandemic situation, the author and company client concluded, that the new way of working and people’s lives were changing, in a way that less social face-to-face meetings were taking place and that this new situation is placing an even greater importance on digitalization. The digitalization platform needs, required even more careful consideration because of this, which might make the value and importance of this project research greater than previously thought.

According to the Finnish Government (Website of the Government and ministries 2020) “Change in effect for the necessary travel for work across internal borders”, the government locked down the borders between countries and issued guidelines stating that people must stay, work and study from home. Of course, this caused a slowdown for Finland's economy and work life, especially with small businesses in the service sector, for example restaurants, salons, and retail shops, etc. In practise, it was very difficult, to run these kinds of businesses successfully and with profit, when the government used special laws to shut down the physical access to customers. The result was that many small businesses ended up bankrupt and with employees laid off. Other businesses that were not relaying heavily on meeting customers face-to-face, started to a much greater degree than before, to have their employees work from home using digital on-line application platforms for work and communication. This new way of working has seemed to work out well and to become a new way of working and living in Finland. Media also stated that digitalization took a two-years leap forward, because of the pandemic. These are some important reasons to why this research could help a small healthcare company get ideas, understanding and solutions on how to implement the digitalization that has become so influent on Finnish society and businesses.

Digitalization has become a trend in the business world, which also means that behaviour of the people has changed, for example in how we combine work and living. According to Lan Wang (Wang 2016, 842) "*One of the important trends of marketing management is digitization*". People are relying more on the Internet, online trading, Internet of Things, and distance work. Thus, a company or organization need to be alert, to adapt and change to the given situation, which will determine their future competitiveness. Implementing a new tool of digital technology can help directly and indirectly to make the company competitive in the market.

1.2 Challenge/problem description

The aim of the thesis topic is, while following the requirements set out by the healthcare company, to upgrade their way of working from a paper-based customer information system to a modern CRM software solution. The purpose for the thesis is to research theoretical information about CRM software, in order to identify the criteria that are of special importance for identifying the best CRM software for the healthcare company, following the necessary law and policy requirements. With this information, the available CRM systems on the market can be researched and compared, in order to find the best fit.

There are many different CRM software solution providers, that have different functionality, so the author needs to understand the requirements and find the best suitable solution on the market. Also, a focus is put on the business market strategy and how to keep the existing customer base satisfied, finding new customers and how to stay up to date with the CRM software to keep the company performing efficiently.

To reach the goal, the first thing will be to obtain the list of requirements and sought-after functionality from the healthcare company. Information will then be collected by researching existing theoretical information from other authors, to answer these following questions:

- How to get the right CRM program for the small healthcare company?
- How to measure and estimate the features of the program?
- How to find the suitable solution for input and storage of data?
- How to ensure customer data privacy and following of laws and policies?
- How to find new customers and new business growth?

After analysing the answers and results from the questions, the best candidate should be identified, out of the available CRM software solutions. Things to consider during the analysis will be for example cost and safe handling of customer data and privacy concerns. The result from this project would be to give the thesis client a suggestion to what CRM software that would make most sense for them to take into use, considering the requirements.

The conceptual framework of the Thesis:
The conceptual framework illustrates the relationships of the key concepts in the thesis. The conceptual framework in (Figure 1), for the thesis, starts with the description of the company's background and requirements, after which the author determine the needs of the company. Based on the needs, an acquisition process is undertaken, to collect data needed for finding out how to determine the suitable CRM software. The

final phase of the conceptual framework is to use different methods to do comparison and evaluation, to determine the right solution for the company's needs.

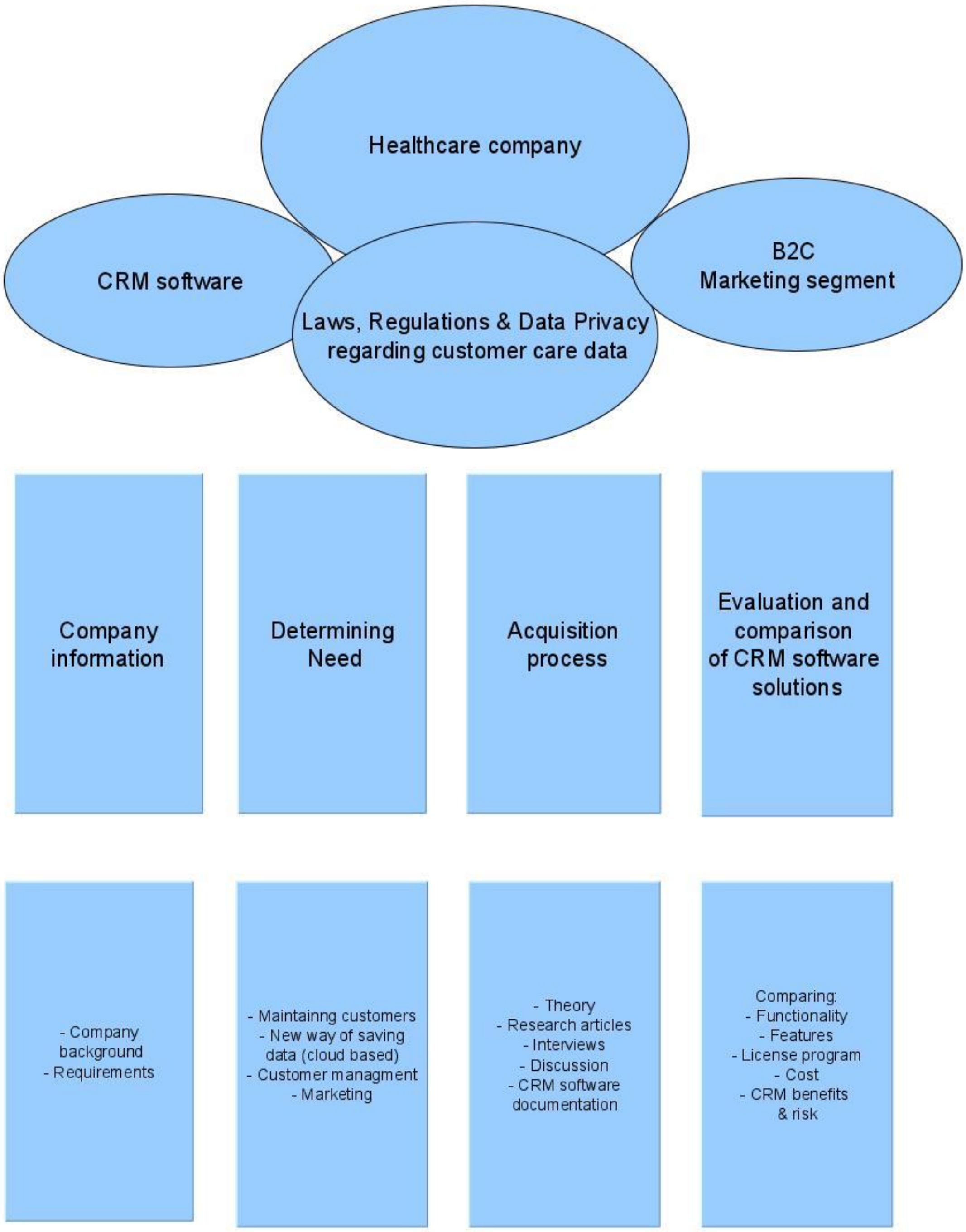


Figure 1. Thesis conceptual framework.

1.3 Research type and method applied

The research type applied for the thesis will be “qualitative research”. The author will use comparative analysis, which includes first-hand observation, interviews, focus groups, usage data, surveys, and other sources of already existing data. This analysis will serve to let the author obtain an understanding and insights based on opinions, reviews, concepts, and experiences. This analysis method will give new ideas of how to make best use of a CRM software for a small healthcare company. The collected data will serve as a source from which it will be determined, through analysis, the factors that determine the most suitable CRM software for this case (O'Gorman & MacIntosh 2014, 118).

The research method is deductive, as the collected data is evaluated by comparison. The suitable CRM system will be selected based on the collected data, conducted interviews and literature reviews. Partnerships regarding this thesis, includes the thesis author, the small healthcare company, an IT-solution company, and the CRM software providers. According to C.R. Kothari (Kothari, 2004) “Good research is logical” *This means that using the rules of logical process and reason of deduction, can provide great value in carrying out research.* The logical reasoning makes research better in the context of the decision making.

2 PSYCHOLOGY FIELD REQUIREMENTS FOR CRM

The research case company is Psykolog Sabina Westerbäck. The type of company is classified as a small healthcare business with staff working as psychologists. The company provides services for children and adult psychology, psychotherapy as part of community provided services and from private healthcare in Varsinais-Suomi, the company is located in city of Parainen, Finland. The company does collaboration work with Pihlajalinna healthcare center, Novia University of Applied Sciences, and TYKS (Turun Yliopistollinen Keskussairaala).

The company work:
When the company have cases, clients are received from collaboration sources, public and private sectors. The company then needs to follow the proceedings and progress for each client, which usually is a long-term process, which means the company will have a lot of collected documents and information for each client. According to laws and regulation under Finnish Psychological Association (Ministry of Social Affairs and Health, 1994), the work information and documentation needs to be kept for at least 10 years in a safety box or vault, and the customer data privacy is a high requirement for the work, as required by the laws and policies requirements. The main point is to keep the client case information confidential and to prevent any information leaks, to keep the client's trust in the company and to follow the law on this matter.
The company's situation regarding information confidentiality and client trust is currently good, according to Sabina Westerbäck, (personal communication on 8.8.2020) "*When the company has many network collaborations, this can help the company to grow in the right direction*". The company goal is to grow, and the way of working should be done in a more efficient way, while another challenge for the company is how to obtain new customers in the small town where it is located, and how to maintain and keep existing customers satisfied.

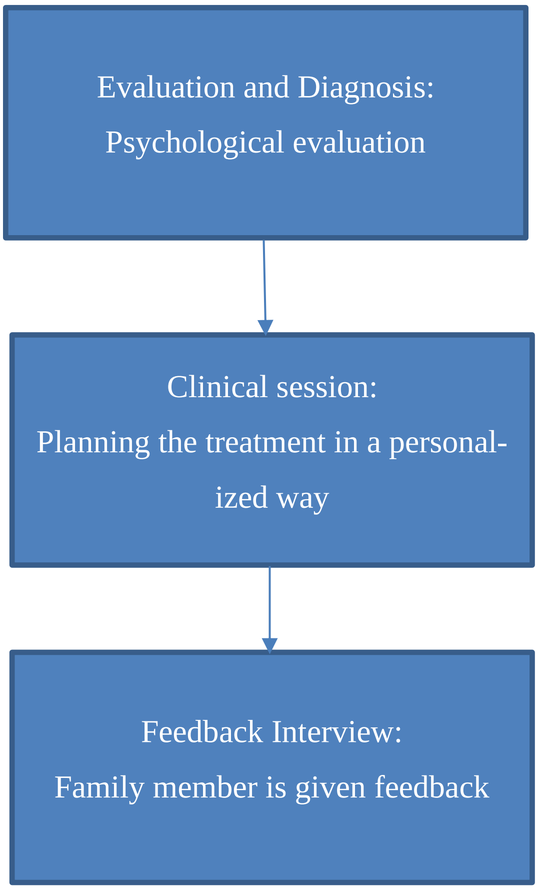
The requirements set out by the company:
The company needs to move away from using old technology and methods, such as paper-based documentation and other out-dated tools. A question raised is if it can be possible to combine the use of both new IT-technology and the old system in use. The new system would also be required to have a connection to the government's

“Omakanta” system for holding patient data. The company also need a new way to manage the existing customer relationships, while also having a system enabling finding new customers and a new way of marketing the company services (Westerbäck, personal communication on 8.8.2020).

2.1 Psychology company processes information

When the company has a patient case to process, then in order to get the patient to start the treatment plan, the patient needs to fill in some background information, answering questions through an interview to determine what problems the patient needs treatment for. An agreement needs to be made between Psychologist and patient, which must include a confidential contract, plan, and timetable for the treatment progress. In the case of underage patients, the responsible adult must be with the patient to help supplying the correct information and this adult must also sign the contract agreement as a responsible adult. In every interview session, the psychologist must write and keep notes regarding the client’s progress.

Table 1. Patient care process layout (Westerbäck, personal communication on 8.8.2020):



The treatment plan process requires many small details, and can be a long-term process, depending on the case issue and problem. Thus, on beforehand, to evaluate the case, the safe handling of the customer's private confidential information is a high requirement according to EU's General Data Protection Regulation (Website of the General Data Protection Regulation 2020).

Table 2. Treatment plans, confidential information such as (Westerbäck, personal communication on 8.8.2020):

Basic information Client name: Date of birth: Address: Phone number: Emergency contract:	Counsellor name:
Problem statement:	Goal:
Patient history:	Diagnosis:
Medication:	Treatment:
Risk and Co-morbidities:	Referrals:
Crisis:	Completing the plan Date:
Client signature, date, place:	Counsellor signature, date, place:
Person(s) Responsible:	

2.2 Customer privacy, healthcare laws and policies related to the evaluated CRM software

Healthcare in society is important as it directly affects people's quality of life and can often also be lifesaving. The healthcare field is complex, as stated by Adewale in his paper Big- Data Technology in Finnish Healthcare: Barriers and Possible Ways Out, "*The complexity of the industry can be attributed to the confluence of different professionals, which includes the physicians, nurses, pharmacist, scientist, researchers, administrators and currently, the information technologist*" (Taiwo 2019, 1). Because of the importance and sensitivity of the information handled in healthcare companies, the information should be used and handled with a high focus on keeping it secure. As mentioned in chapter 2.1, about EU's General Data Protection Regulation (Website of the General Data Protection Regulation 2020), all software products for the healthcare field should have the priority to fulfil the GDPR.

Related to the GDPR and how it keeps data secure in practice; based on news of the case regarding the psychotherapy center Vastaamo in Finland, the requirement to follow the GDPR is not enough, as sensitive data was leaked. Vastaamo received patients from many sources, such as the public sector, including Oulu University Hospital and Tampere University Hospital. This was a case where hackers had gained access to the center's sensitive patient data, originating from before November 2018, affecting about 40000 patients. The hacker released patient data for 200 patients and asked for ransom money in bitcoin for about 450000 euros to not release more data. Vastaamo was aware of the data leaks already for a time of two years but hid this information. To prevent this situation from happening, it would be good to have laws in place to require monitoring and auditing of these systems used in healthcare, to for example make sure that the patient data is handled using encryption and best practises for security. As the government of Finland have no law and regulation in place to require the necessary level of monitoring and auditing of the software systems used by health care companies, this attributed to Vastaamo's data leak (Bülow 2020).

2.3 Information and benefits of CRM software in general

Many people might think that CRM software (Customer Relationship Management) is just a data tracking tool, but after in-depth understanding one can see that CRM software can provide many benefits and solutions as the right tool for managing relationships between companies and their customers.

In the book "Analytical CRM" by Markus Wübben, he writes about the beginning of the history of CRM and the authors who helped to define it. One such author was Arndt, who in 1979 stated the following "*He believed that the long-term buyer-seller relationship is an important factor in the growth of domesticated markets.".* The way of Ardnt's thinking, is that long-term buyer-seller relationships are the main things to help a company grow in markets and that this therefore is important to manage carefully, which created the need for CRM solutions. Another author, Bagozzi (in 1974 and 1978), also had similar thoughts as Ardnt, and was one of the first to argue that "*exchange relationships are the essence of marketing*". The concepts and thoughts on relationships and markets define the fundamentals of Customer Relationship Management (Markus 2009, 11).

2.3.1 Definition of CRM (Customer Relationship Management):

CRM is a technology by which all a company's relationships and interactions with existing and potential new customers are managed. The main goal is to improve the relationships in the business. The system is meant to help the company stay connected to its customers, to improve the profitability and to make the process of running the business more streamlined and efficient regarding interactions with the customers. In practice, a CRM system typically means functionality such as customer contact management, tools for increasing productivity and sales management.

A CRM system helps the company to keep focus on the relationships with individual people, such as customers, colleagues, suppliers, collaboration partners and service people. The system is of use throughout the whole lifecycle of the business having relations with the other partners, helping the company to find new customers, winning new deals that bring in new work and revenue, and providing support and other services for maintaining the customer relationships (Ventelä 2019).

According to Sathish Mariappan from Innoppl Technologies, the companies who used CRM software achieved the sales quota set out for the sales representatives in 65% of the cases, while other companies' sales representatives that were not using CRM, failed to achieve the sales quotas in 78% of the cases (Mariappan 2011).

Table 3. CRM used, sales representatives meeting the sales quota (Mariappan 2011)

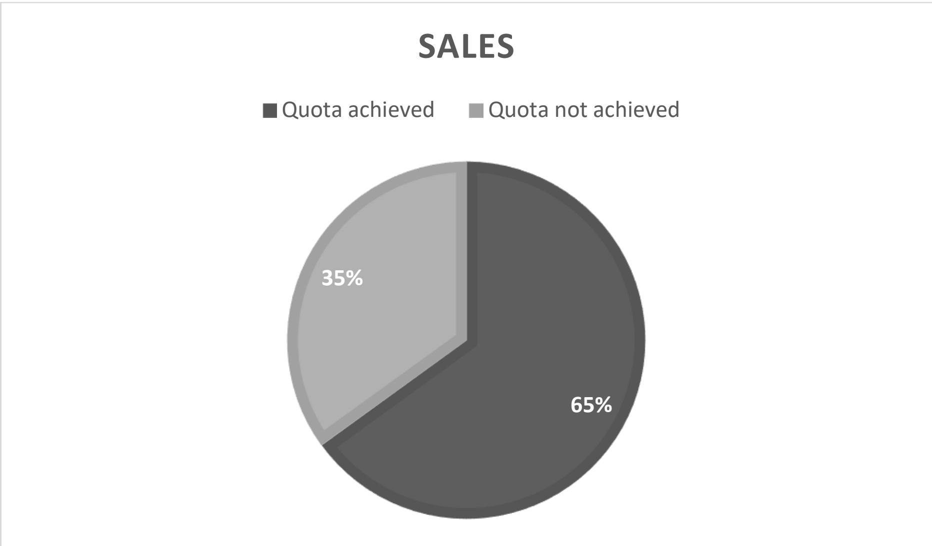
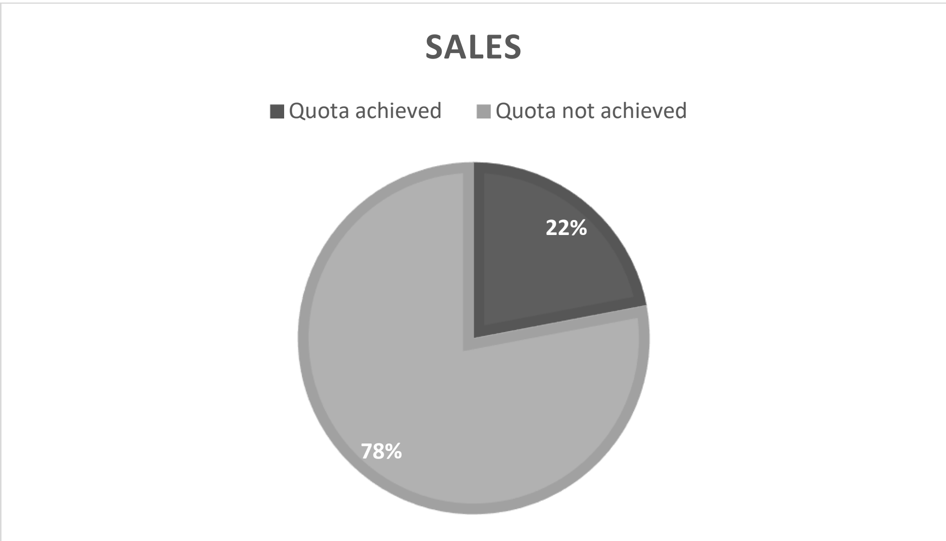


Table 4. CRM not used, sales representatives not meeting the sales quota (Mariappan 2011)



2.3.2 CRM software benefits

Using a CRM system can give a company a clear overview of their customers. What enables this is that the CRM system has all data stored in one place, which makes it easier to keep the data safe and to ensure that it is valid by not having overlapping systems and data. A customizable dashboard is usually also available, providing a fast view over the most critical data. A CRM system can also connect to social media platforms, providing a fast and easy interface to manage marketing for customers and to find new customers and markets, through inquires across different channels without losing track and enabling finding of new customers. Also, integrating the CRM with different social media, provides the company with the ability to provide a one uniform marketing view across all platforms.

According to the ITIC CRM Deployment Trends Surveys in 2011 and 2012, published on TechNewsWorld web site, the following benefits, and the importance in percentage of CRM where found, that can be achieved with CRM software (DiDio 2011).

The statistics regarding benefits of CRM software (DiDio 2011):

Table 5. Improving customer relationship series

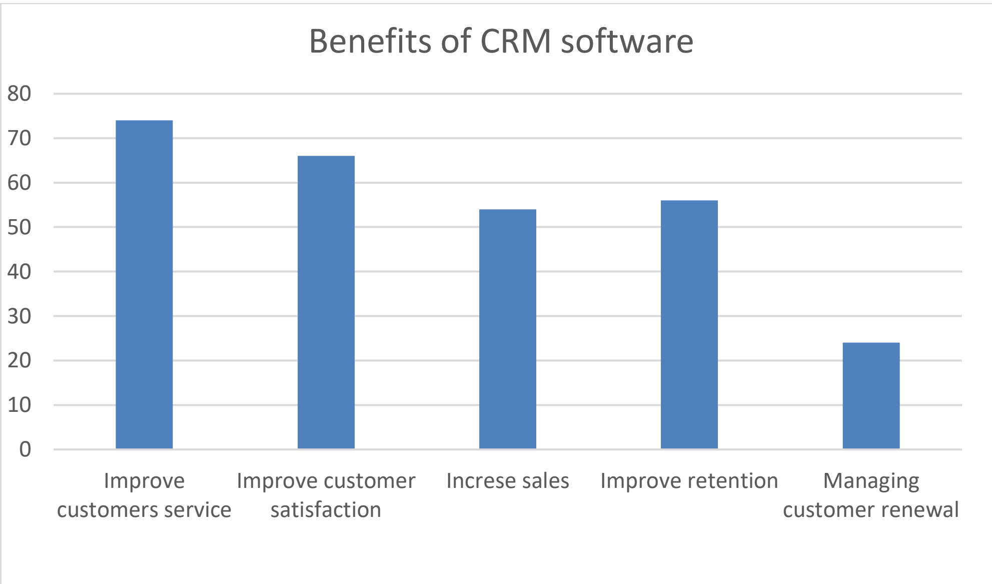
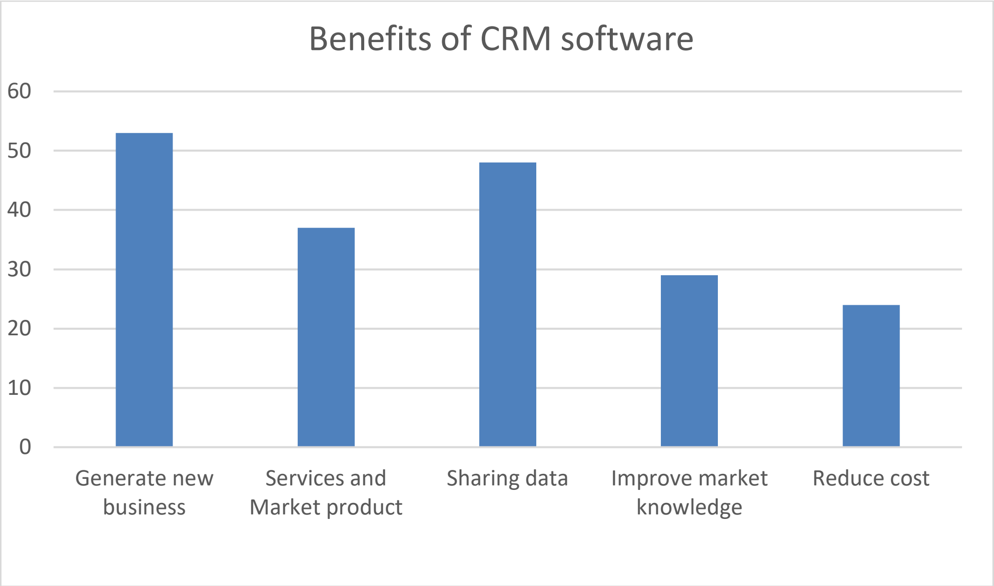


Table 6. Marketing segment series



2.3.3 Risks of using CRM software

A customer relationship management system can also become a risk for a company that takes it into use without enough understanding and preparation. Risks can be roughly separated into two groups, one group with risks regarding the software and IT matters and another group with the users of the system (Eckel 2009).

Risks regarding the software and the IT infrastructure include loss of data, leaking of unsecure confidential data, insufficient data backup procedures and break-down of IT-hardware. To avoid these risks, often the way is to have IT-support and people to manage so that these risks do not come true. These risks might be especially common in small companies, where the IT-support side might be almost non-existent (Eckel 2009).

There is a risk to take a system into use and to then not think about how to maintain the system and software itself. Things like scheduled back-ups of data, maintenance of IT-hardware and other monitoring tasks are important to avoid these risks.
The users of the system can be a risk in cases where the software itself is working as intended but the users are not able to use the system correctly, which can happen for

example if there is insufficient training or if the system itself is very difficult to use, for example through a difficult user interface, which logic is not easy to understand (Eckel 2009).

According to the paper Customer Relationship Management (CRM)
and Its Risk Factors, published by the journal International Journal of Scientific & Engineering Research (Sourizaei;Keikhayfarzaneh;Khalatbari;& Keikhayfarzaneh, 2011), the following risk factors of using a CRM system can be identified:

- Customer not satisfied with service
- Leaking of Data and information, IT and E-commerce
- Lack of customer focus
- Lacking quality in the relationship with customers
- Lack of funding for CRM projects
- Weakness of user knowhow regarding implementing and using CRM software
- Lack of sufficient user support

3 SELECTING THE RIGHT CRM SOFTWARE

In order to know what CRM software that could be suitable to select, qualitative data collection methods are used for analysis. The market for CRM software has many software providers to choose from. Some providers place more focus and importance on certain aspects of the software, that influences the suitability for the needs of the thesis client. Some CRM software can for example be especially suitable for use by large companies, where there is extra focus on situations with simultaneous use by many users, so that the reliability and efficiency can be guaranteed under heavy load.

Below is an overview over the data collection tools used for the analysis.

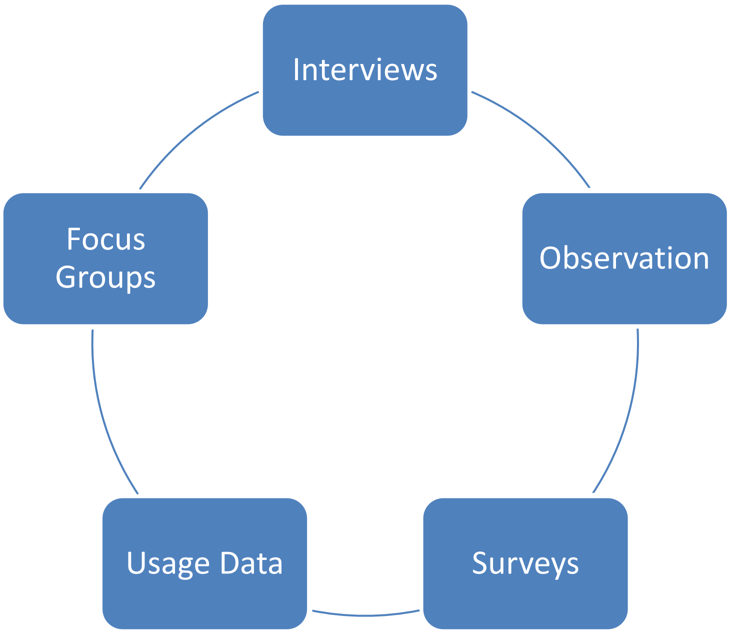


Figure 2. Data collection tools

3.1 Collecting and analyzing data for CRM software

The author will use a table as a tool for qualitative comparative analysis. A table will work as a visual aid, that can help to reveal conclusions that otherwise might not be obvious (Suter 2012, 351). The data will originate from different sources, such as interview questions, software reviews and overall ratings. The author will collect product data from five different CRM software providers, which are:

- HubSpot CRM
- Pipedrive CRM
- Capsule CRM
- Salesflare CRM
- EngageBay CRM

Much of the data is provided by the web site named Capterra, which provides a service to assist users in finding the software they need. Capterra maintains up to date information on modern software available on the market and provides detailed information, reviews and user opinions about each software featured through their service.

After collecting the data, the author will compare the functionalities provided by the software available. The comparison is done by listing the CRM software candidates and the provided functionality, benefits, risk factors and positive and negative remarks into a table-structures. The use of the tables helps to provide a structured overview of the data, which will lead to finding out which software candidate is the best fit (Website of the Capterra 2020).

3.1.1 Collecting data by interview

As part of collecting data on CRM software, in this thesis, the author held discussions and an interview with a software developer from the company Asitek Oy. The following questions below, where discussed and answered by Conny Karlsson (personal communication on 17.11.2020).

Question 1. Is CRM software in general suitable for a small healthcare company?
Answer: CRM software is a special tool to manage customers, increase sales, managing marketing, finding new leads to convert into customers, overview of company financial data using dashboard reports etc. This type of software is equally suitable for both small and large companies, although the bigger the company, the more benefit can likely be seen from using it.

Question 2. Is CRM software easy to use and easy for users to learn?
Answer: Most CRM software work in a similar way, which makes it especially easy for users to understand when they have some prior experience from before. But even in cases, with no prior CRM experience, the basic concept is easy to understand. Many of today's CRM software are based on on-line cloud services and often include a training or demonstration mode to help the user learn how to use the application. Many also have smart phone versions of the applications, that also makes it easy to try out functionality on your own phone.

Question 3. Do you think that CRM software can help with finding new customers?
Answer: Yes, many CRM software has built-in functionality for helping with marketing and advertising. The software can help to create and automatically manage for example e-mail campaigns and advertising on social media platforms. There is also often functionality to help you connect to potential customers, like chat functionality and automatic web forms that can be used company web sites.

Question 4. Is it safe, regarding customer privacy data, to use CRM software?
Answer: According to the interviewee's opinion, there is not a 100% guarantee that all CRM software can keep the private data safe at all times. Many CRM software providers state that they comply with for example GDPR, but this alone doesn't guarantee complete privacy at all times. Data should for example always be stored in an encrypted form, so that it is not easily readable, and this might not always be the case.

Question 5. Can CRM software connect to other programs, for example for importing contact information?
Answer: Yes, many CRM software have built-in functionality for example to read contact data from sources like e-mail applications. Also, for special functionality, a CRM

software can provide an Application Program Interface (API), which other software developers can use to exchange data with the CRM software, which enables a lot of possibilities for creating your own custom functionality.

Question 6. What is recommended, to make a custom-made CRM solution or to use a ready-made CRM solution?
Answer: There are quite many ready-made CRM solution providers available, most require the user to pay for the service as a monthly or yearly cost. To create a custom based solution would require a lot of software development, leading to likely quite a big cost. For most companies and users, one of the ready-made solutions available will likely have all needed functionality with a cost that is not too high. A large company, with a lot of special needs, for example to integrate the CRM software with other IT-systems in place, might see a custom-made solution as a better option in the long run, as it will provide them with the exact solution to their needs and the option to keep extending the system as needed.

Question 7. What is the opinion, on if it would be worth it for a small healthcare company to change from a paper-based system to a CRM software?
Answer: Yes, the interviewee was of the opinion that anyone, small or large, will benefit from moving away from a paper-based system, as it would make sure that all data is always available in one place and also easy to backup for security. Paper-based data is easy to lose and difficult to use for finding information. Using a CRM will make handling of customer data more efficient, which could even be seen as a better quality of service for clients of the company.

Question 8. Can you make any recommendations to what CRM software would be suitable in this case?
Answer: There are many options available, and it is difficult to say which to recommend over another. There are on-line reviews available that could help to find suitable CRM software, reading these and first-hand experience of users, could be a good place to find out about a suitable software. Today’s software stores, such as Google Play, Apple’s App Store and Microsoft Store also contain reviews for the available CRM software.

3.1.2 Usage data collection

The author selected 5 CRM software to start the data collection process. These top 5 CRM software were selected based on that they were listed as the most popular and up to date with current technology, according to the website of Capterra. The CRM software to consider was determined based on the number of reviews, how popular the software was. Information and reviews of available CRM software was investigated by use of the on-line web application called Capterra (Website of the Capterra 2020).

The data collection should include the following:

Table 7. Considered CRM software and respective number of reviews

Number of reviews	**CRM software provider**
2653	HubSpot CRM
2248	Pipedrive CRM
110	Capsule CRM
119	Salesflare CRM
64	EngageBay CRM

Table 8. User experience ratings

CRM Software provider	**Overall user rating** ☆☆☆☆☆
HubSpot CRM	4.5 / 5
Pipedrive CRM	4.5 / 5
Capsule CRM	4.5 / 5
Salesflare CRM	4.7 / 5
EngageBay CRM	4.6 / 5

3.1.3 Data collection based on focus groups

Comments and user reviews, by users with first-hand experience of the software, are collected for the five different CRM software, based on the positive and negative reviews.

Table 9. Positive and negative user reviews of HubSpot CRM (Website of the Capterra 2020)

Positive reviews	**Negative reviews**
It has a lot of the key features in a CRM, but the best part is the ability to start free and have the chance to grow before you have to pay anything.	*There have been multiple occasions where data has been lost and was unretrievable, and in a different scenario, we have to repeat steps because the bugs would prevent our resolutions from saving.*
So far, my experience with Hubspot has been a good one. The software has enable my business to become slicker and more productive, not to mention more pro-active.	*I am not sure if this can be changed, but an annoying thing that happens with the service is that it logs me out and if I don't log back in I miss things in the system.*
The round robin style workflow for multiple sales reps is super helpful for lead assignment is great and the reports area also provides great insight into things that are going on with the department.	*I do not know who is doing the research on the companies but they are wrong 85% of the time. Contact listed is always wrong and make you look stupid when you ask for someone who does not work there.*
I love the ability to see reports on almost everything. Customized messaging with sequences has helped us be more productive while providing analytics into what type of messaging is effective.	*No call recording for Canadian leads which is a bummer, sometimes the logging of interactions can be a little buggy and I find dealing with duplicate leads a bit of a pain.*

Table 10. Positive and negative user reviews of Pipedrive CRM (Website of the Capterra 2020)

Positive reviews	**Negative reviews**
I can see how it would be a great option for a larger organization, but for a one-man shop, I didn't need all of the features, but it was great to have them as an option.	*I hate doing sales and realized that if I was going to take the reigns for it in my business, I had to be way more organized."*
Thanks to Pipedrive it is now possible to design the best sales strategies and we have obtained excellent results, in addition, the software does almost all the work for me.	*I would have stuck with this software if it had not merged my calendars and copied things from previous years causing me a lot of stress, headache, and confusion with my day to day tasks.*
I like how Pipedrive helps to track leads and users coming from various channels and focus on those that are the most effective. I love filters you can create and save to track campaigns.	*We don't pay the premium licence, so we can't send e-mail directly from the platform. I think it's the only thing that is missing.*
It has been a great experience overall with the software. There hasn't been any hiccups to date and the software has always provided the best results.	*Functionality was terrible, I don't know if we misunderstood and they aren't actually a CRM system but what the product offered cannot be called a CRM.*

Table 11. Positive and negative user reviews of Capsule CRM (Website of the Capterra 2020)

Positive reviews	**Negative reviews**
Great starter CRM for iiduals and small business.	*The tasks and the layout - lack of customisation - colours or icons - fields can be hard to identify at a glance."*
I have used at least a dozen small-business CRM systems. Capsule is like my	*Capsule has several weaknesses you should be aware of.*

favorite pair of jeans -- it fits, never gets in the way, and makes me look good.	
The app uses the cloud based client database as a sort of substitute for your phone's address book, phone dialer, and portal to add client interactions. Best mobile app for a CRM platform.	*Now I can't see all my tasks for the month at once, it truncates after 3 or 4 on any given date, and hides the rest.*
I also like the ease with which I can create my own "tracks" for processes that I often repeat.	*Not sure if it would stretch to bigger business due to limited functionality*

Table 12. Positive and negative user reviews of Salesflare CRM (Website of the Capterra 2020)

Positive reviews	**Negative reviews**
I love being able to enter clients and potential clients and track them through the process. The reminders are great, even telling me to add notes from phone conversation.	*Nothing really - bulk edits could have more options, rather limited currently.*
This means we don't have to log meetings/notes manually and that saves a ton of time. Apart from that, their auto-enrichment of companies and people works like a charm.	*Setting up the flows can be a bit confusing, opening a client on the pipeline opens a small side panel and you have to click twice to read the details.*
Automatically tracks your inbox so that you can easily convert any contact into an account. Then, you can start tracking opportunities.	*Price is high, could be 9 dollars year so small business could afford to pay for the tool and use it.*
I have been using salesflare, to follow up the opportunities and it is great with the reminders for follow ups.	*A proper email sequence/drip functionality is missing.*

Table 13. Positive and negative user reviews of EngageBay CRM (Website of the Capterra 2020)

Positive reviews	**Negative reviews**
The software is extremely useful for new businesses. They have a very proactive team that loves taking suggestions and works on the same instantly.	*NO SMS Function However I have been told this is coming soon."*
Our marketing efforts over mails are no more efforts. Its now just a good creative and we are good to go.	*It made no sense that they rather lose a customer totally than provide a discount so that to me suggested bad business and support in the future."*
I see a lot of potential and I am happy I found EngageBay. I hope all issues will be solved soon.	*It's hard to edit email Templates and landing pages."*
I really like what EngageBay is doing and am glad to be using their service.	*Landing page templates are very limited at the moment.*

3.1.4 Data analysis to determine the final three candidates

After collecting information of different CRM software, while taking into consideration the overall user ratings of the CRM software and reading the positive and negative user comments, based on real-world experience of using the CRM software, the data was analysed resulting in:

The result for suitability is shown in (Table 14), regarding which three CRM software to select as candidates for analysis in the empirical part of the thesis. The suitability of the software was considered using the number of reviewers for each CRM software, the overall user ratings and the positive and negative user comments. A higher number of reviewers for a CRM software was considered to represent a more trustworthy overall user rating, as a larger user base better represents the overall opinion of the software.

Table 14. Analysis result of suitable CRM software to choose from

CRM software provider	Suitable	Not suitable
HubSpot CRM	X	
Pipedrive CRM	X	
Capsule CRM		X
Salesflare CRM	X	
EngageBay CRM		X

The three CRM software selected as suitable for further analysis are HubSpot CRM, Pipedrive CRM and Salesflare CRM. HubSpot CRM and Pipedrive CRM had a considerably higher number of reviewers, which is why they were selected as suitable. Salesflare on the other hand didn't have a high number of reviewers but its overall rating was the highest at 4.7 and it generally had the most positive user comments, which is why it was selected for further analysis.

Capsule CRM and EngageBay CRM were not selected, because the number of reviewers was low, and they generally also had some negative user comments that influenced this decision. The overall rating for all CRM software was generally high around 4.5 out of 5.

3.2 Storing of customer information

One requirement of the client Psykolog Sabina Westerbäck, was that there is a need to find out how to enable using a system for customer data, that would involve both paper-based documentation together with digitally managed information. According to Lan Wang "*Using the CRM based on SaaS means that companies receive practical functions from the user end, and these functions should be coordinated and convenient for practices. Cloud users get access to software via cloud client ends (usually web browsers).*" (Wang 2016, 846). Many CRM software might today make use of cloud technology to store information and to provide the service itself. The author must take into consideration how a cloud-based CRM system could be used in an environment where some data is stored locally in paper form. One thing to especially consider here is how to manage the relationship between paper-based and digitally cloud-stored data, so that information could be retrieved easily from either source.

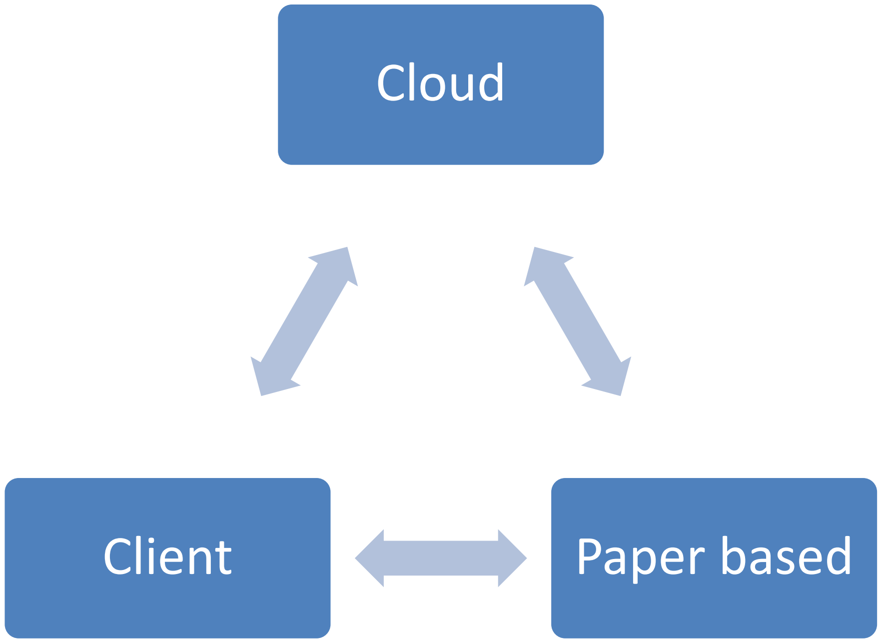


Figure 3. Relation between cloud and local

3.3 New customers and business growth

To fulfil the requirement set out by the thesis client, on "Finding new customers and growth for the healthcare company", the CRM software described have the functionality to be able to increase the sales market for the healthcare company. The commonality of all CRM software is to handle, increase sales and to make the sales process flow efficiently. In order to find more customers, one functionality that can be seen to fit well for healthcare is CRM marketing functionality.

Marketing functionality is easy to use and it allows a direct connection from the CRM software to social media, such as Facebook Advertising, Google Ads, Instagram Ads and other similar platforms. These advertising capabilities are built in for CRM software, making marketing easy when the integration is ready between the software platforms and by allowing the user to manage the advertising through marketing campaigns.

The benefits of the integration have also been stated by Shani and Chalasani (1992), as "*an integrated effort to identify, maintain, and build up a network with individual consumers and to continuously strengthen the network for the mutual benefit of both sides, through interactive, individualized and value-added contacts over a long period of time*" as stated in the research paper of "The Domain and conceptual foundations of relationship marketing" (Atul & Jagdish 1999).

The dashboard functionality of many CRM software also helps to steer the company in the direction of increased growth. This is accomplished by showing automatically compiled information about key factors influencing growth and success, such as (Aten 2019):

- Important leads and conversation rates
- Revenue, current and forecast
- Sales cycles and plans, current and forecast
- Top lists for won and lost deals
- Seller performance indicators
- Marketing performance indicators

3.4 What and how to measure, and what to estimate

Measurements will be made for factors such as provided functionality, cost, opportunities for extension of software capabilities, data storing possibilities, level of vendor support and usability of the software. Possible risks regarding the CRM software candidates will also be assessed for each candidate, as this might have an effect on the decision on what candidate to select as a best fit for the client. A risk methodology will be applied to each candidate, to determine the severity of the identified risks.

Table 15. Example of risk scorecard.

Index	Description of Generic Risk	Score
1	Likelihood of leaking privacy data	2
2	Difficulty in using software interface	2
3	Expensive software	2
4	Badly working software support	1
5	Risk factor n…	4
	Total score	11

The identified risks will be used to calculate the overall risk score. A higher severity and frequency will add more to the risk score compared to lower severities and frequencies. Each candidate will be identified in the risk matrix by use of letter (e.g., candidate 1 = A, candidate 2 = B etc.), after answering the questions regarding different possible areas of risk. A score between 0 and 5 is allocated to each identified risk, of each CRM software candidate. After the total risk score, this will allow author to apply risk mapping based on the score, shown in a matrix.

For the comparing of the software functionalities, templates based on table structures shown in (Table 16) and (Table 17), will be used as the main tool. Based on the findings from the comparison, it is hoped that one candidate can stand out as a clear alternative that can fit the needs and requirements set out by the client. The table will list all relevant functionality and features of the candidates and will make it easy to see what requirements are being fulfilled and which are missing.

Table structure for comparing functionality:

The CRM software candidates are listed in table columns, while the rows list different CRM functionalities. An "X" will mark the functionality as included for the different candidates.

Table 16. Functionality comparison

	Candidate 1	**Candidate 2**	**Candidate 3**
Functionality 1	X		
Functionality 2		X	
Functionality 3		X	
Functionality n…			X

Comparison of available deployment platforms:

The following table structure is used for comparing the available options for deployment of the CRM software candidates. An "X" means that the deployment option is available for the candidate.

Table 17. Deployment platform comparison

	Candidate 1	**Candidate 2**	**Candidate 3**
Deployment platform 1		X	X
Deployment platform 2		X	
Deployment platform 3			X
Deployment platform n…	X		

4 THE SUITABLE CRM SOFTWARE

Based on the preliminary observation and reviews of the CRM software, three out of the first five CRM software where selected as the final candidates for further analysis and comparison. Based on the following functionality, the listed features of the products were considered against the defined requirements. The products were also tested and evaluated by installing them on test systems or by registering for trial usage. The following CRM products are described below:

- HubSpot
- Salesflare
- Pipedrive

The author is of the opinion that the three listed CRM software might be suitable for a small healthcare company, based on the defined requirements of the thesis client. The features of the three selected CRM software put focus on different features and have slightly different ideas behind what and how to achieve CRM functionality. The author uses figures of the CRM software and descriptions to try to in a simple way describe the different functionality of the CRM software.

4.1 HubSpot CRM

According to Dharmesh Shah, founder and current CTO of HubSpot (Website of HubSpot, 2020), he says "*We believe businesses can grow with a conscience, and succeed with a soul — and that they can do it with inbound*". The company opened its doors in 2005 with the belief of unifying education, software, and community to make businesses grow. The main idea of HubSpot is to include all important details about a company's contacts in one place. This includes all communication history, like e-mails and calls and other documents like open offers and potential leads.

This allows the user to focus on each contact that the company has. Each interaction with the contact leaves a trace, that can be automatically tracked in the application. These traces and tracked information will help to stay up to date with each contact and to avoid missing out on potential new business. The application also has functionality for helping with creation of new sales and reporting functionality to keep up to date with achieving goals and to make sure that the business flows.

HubSpot is provided as a SaaS (software as a service) solution, which runs as a web- and cloud-based solution. A mobile application is also available.
There are six main areas of functionality in HubSpot. A seventh area exists as a paid feature, which enables automation of tasks provided by the application.
A free version is available with the basic features, without any time limits. There are three pricing plans available, Starter for 41 euros per month, Professional for 740 euros per month and Enterprise for 2944 euros per month.

The following functionality is provided by HubSpot’s CRM software.

1. Contacts functionality:

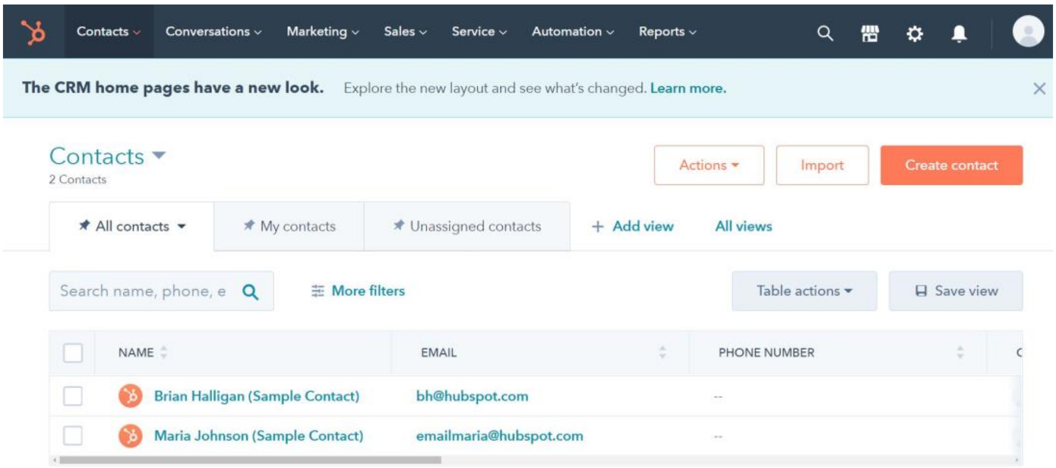


Figure 4. HubSpot Contacts functionality (Website of the HubSpot, 2020)

It can be seen (Figure 4) from contacts functionality, that this is for managing information about client companies and contacts. Contacts can be viewed in list form with applied search criteria. An activity feed can show all recent activity with a certain company and/or contact.

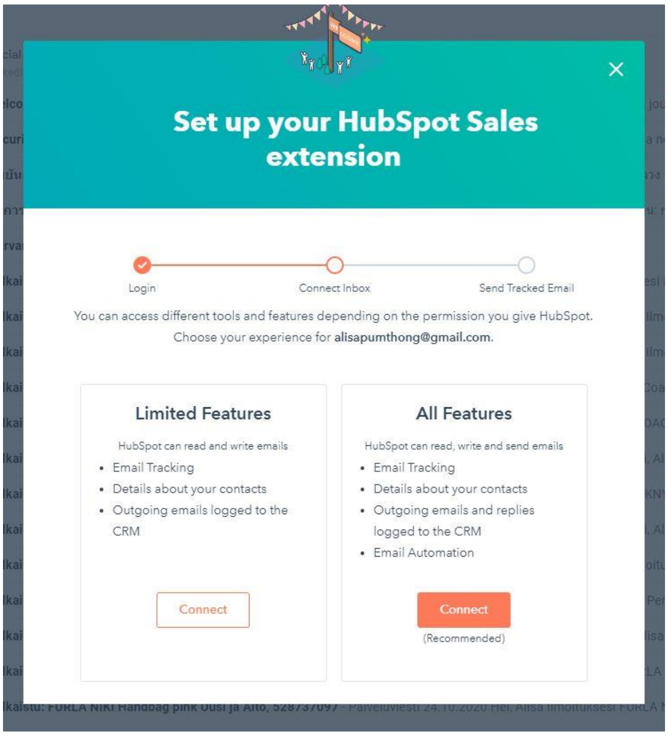


Figure 5. HubSpot Contacts Activity Feed extension (Website of the HubSpot, 2020)

In the Figure 5, the activity feed can be synced to the company e-mail to show the activity for a contact in the feed. The synchronization takes place by installing a web-browser extension, HubSpot Sales extension.

2. Conversations functionality:

This section is for managing conversations functionality, (Figure 6) which includes different chat services, for example provided by social media platforms such as Facebook Messenger. This enables the tracking of real-time chat conversations that have been held with contacts.

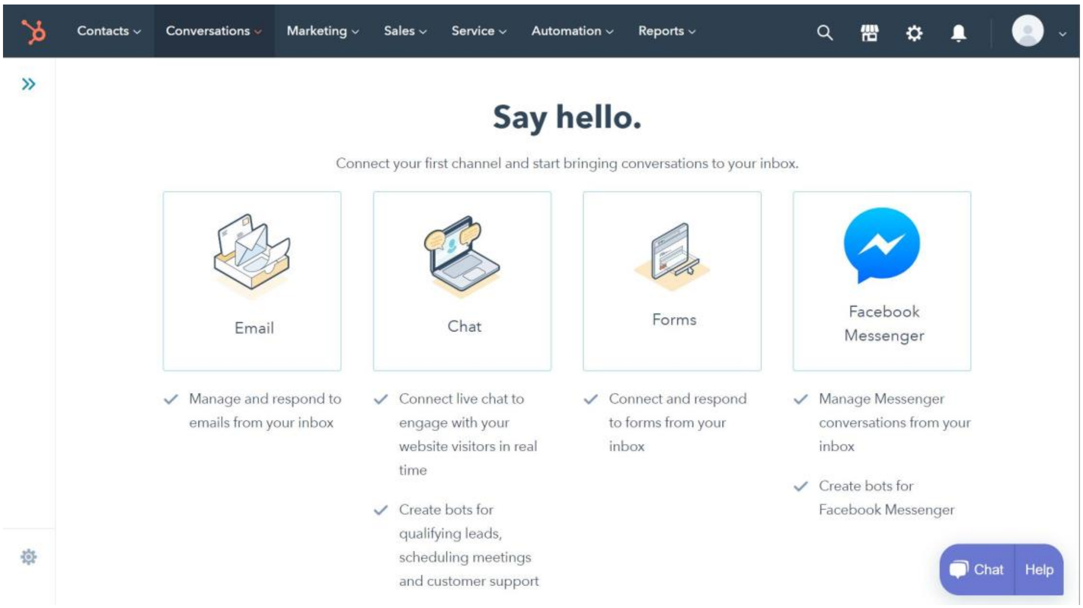


Figure 6. HubSpot Conversations functionality (Website of the HubSpot, 2020)

It is also possible to create "bots", which is short for robot and it is a software that performs an automated task over the internet. These bots can provide automatic answers to commonly asked questions for your contacts.

3. Marketing functionality:

The marketing functionality includes tools for advertising, e-mail marketing, responsive landing pages and forms for converting web site visitors into potential leads.

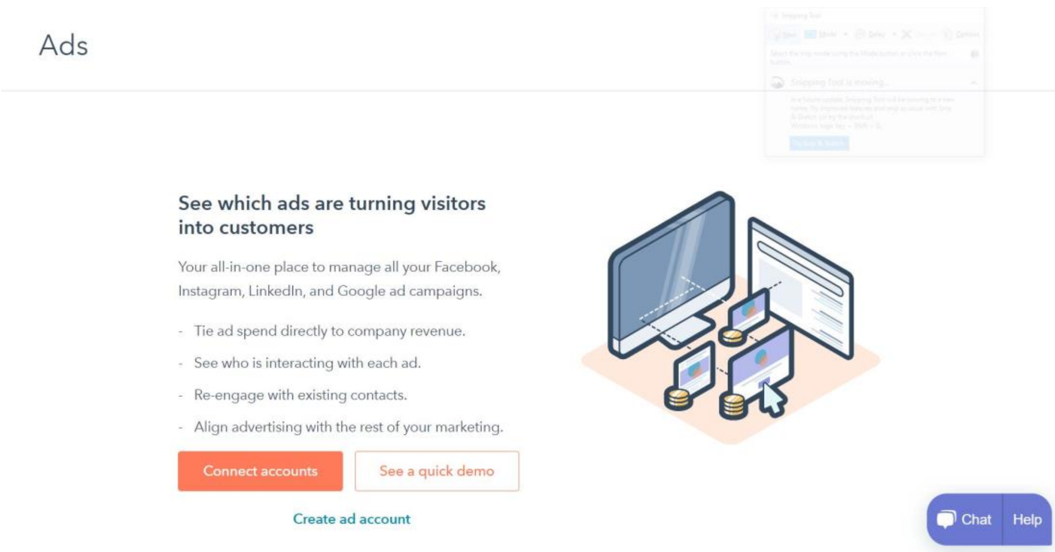


Figure 7. HubSpot Marketing functionality (Website of the HubSpot, 2020)

(Figure 7) This functionality allows the company to connect the marketing and advertising to social media in an easy way. It is also possible to configure marketing campaigns to automatically send out marketing letters by e-mail.

4. Sales functionality:

The sales functionality includes features for managing deals, sales tasks, company documents, meeting scheduling and sales quotes. Reminders can be set up to not forget important tasks, such as for example following up on sent out offers by calling the contact in question. Quotes can be created and sent out easily by use of ready-made templates.

The sales meetings function (Figure 8) can help the company staff and the contacts to easily find the times for meetings, that work for all involved, by use of a shared calendar.

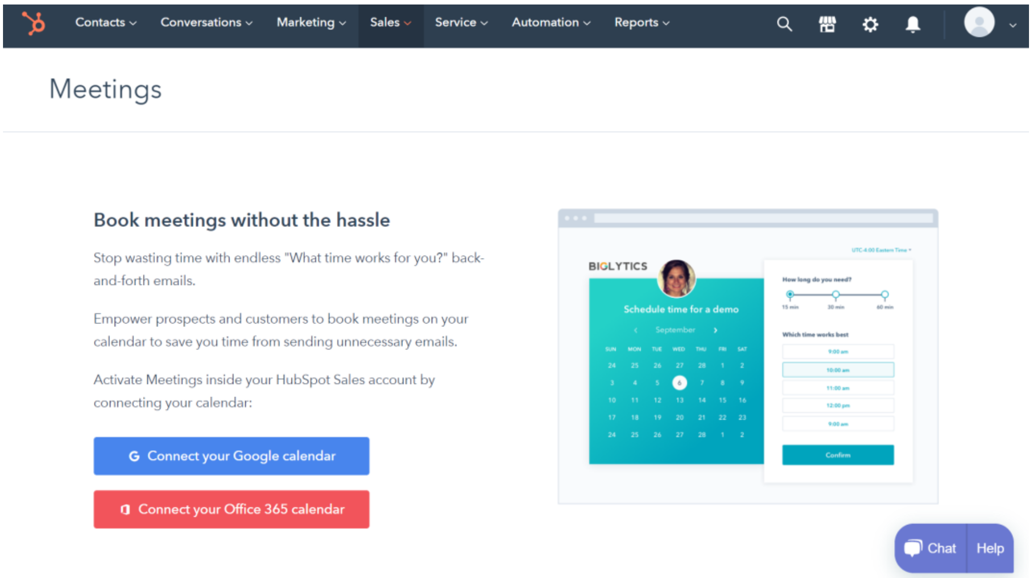


Figure 8. HubSpot Meetings functionality (Website of the HubSpot, 2020)

5. Service functionality:

It can be seen in (Figure 9). This functionality helps the company keep track of contact complaints by use of a ticket-system. The open and closed tickets can be tracked and help to find a solution to the complaints.

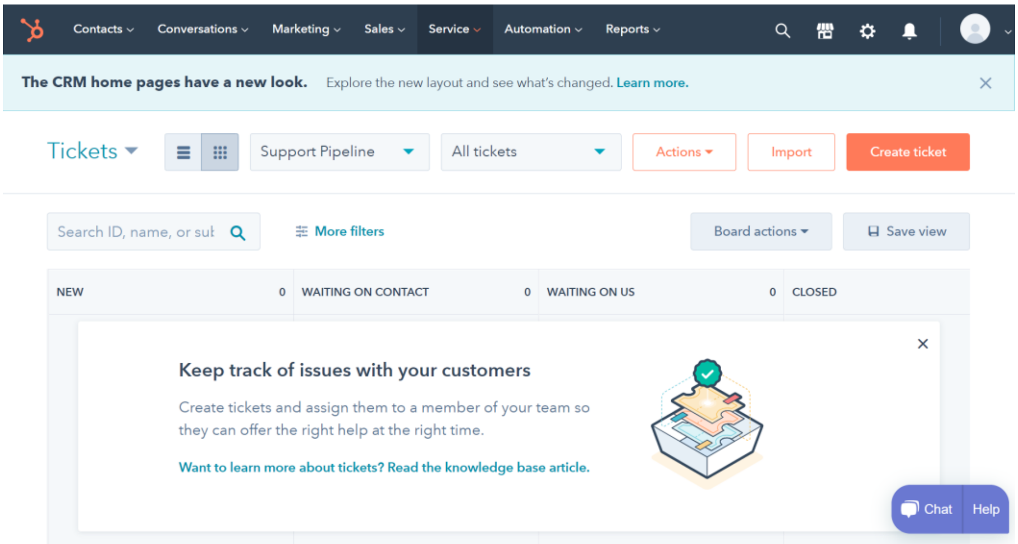


Figure 9. HubSpot Service tickets functionality (Website of the HubSpot, 2020)

6. Reports functionality:

Reporting includes functionality for analytics tools and dashboard reporting.

The analytics tools can be used to track traffic sources and the progress of ad campaigns by analysing the company’s web traffic. Reporting functionality is provided as for example lists of open and closed deals. Dashboard reporting (Figure 10) is used to show the overall situation and progress for goals, the key important information for the company to follow regarding their customers.

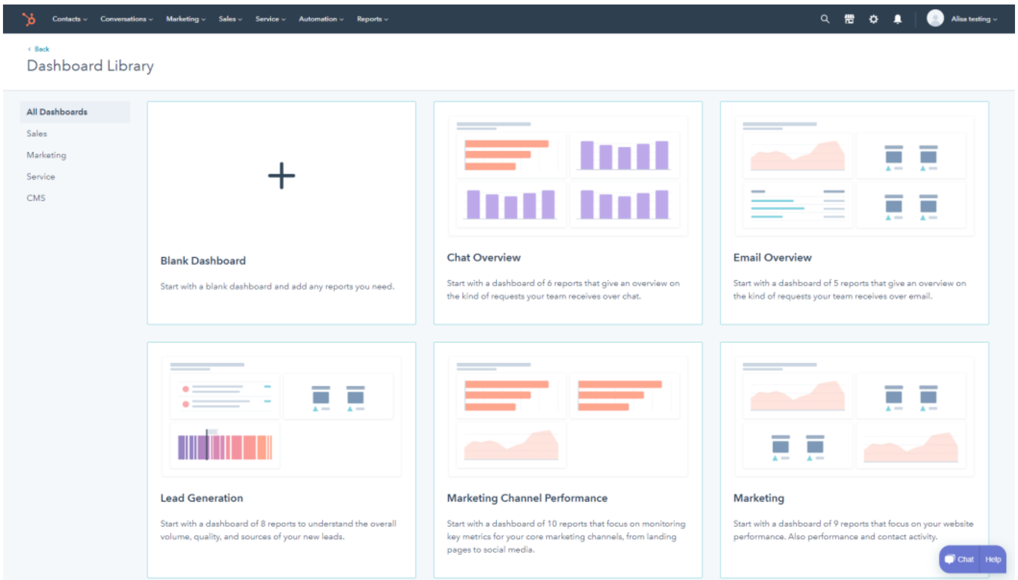


Figure 10. HubSpot Reports, Dashboard library functionality (Website of the HubSpot, 2020)

4.2 Salesflare CRM

Salesflare is the creator of the Salesflare CRM product. According to Salesflare (Website of the Salesflare, 2020), the main focus for the CRM product is to automate as much of the functionality as possible, in order to create a product where the users would be entering less data and be allowed to instead focus on the contacts and leads themselves. In the (Figure 11), the CRM software also enables connecting your own customized CRM related data to their product, by use of a built-in API (Application Programming Interface). The CRM software works as SaaS and has additional applications supporting the product, such as smart phone and smart watch applications. The software is available as a trial version for 14 days. The pricing for the software is fixed at 30 euros / user / month.

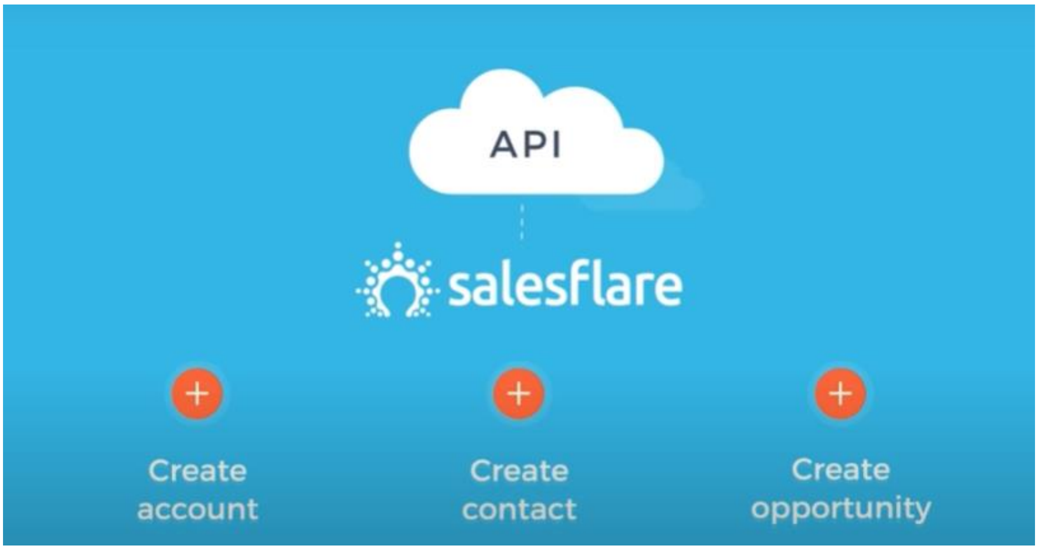


Figure 11. Salesflare Application Programming Interface functionality (Website of the Salesflare, 2020)

The main sections of the program are Home, Accounts, Contacts, Opportunities, and Insights. All sections are focused on improving sales and to help the users to save time while managing their customers.

1. Contacts functionality:

(Figure 12) Contacts lets the user manage and synchronize contact information from sources such as e-mail and social media platforms, where this data is available. The data synchronization is automatic without the need of user input.

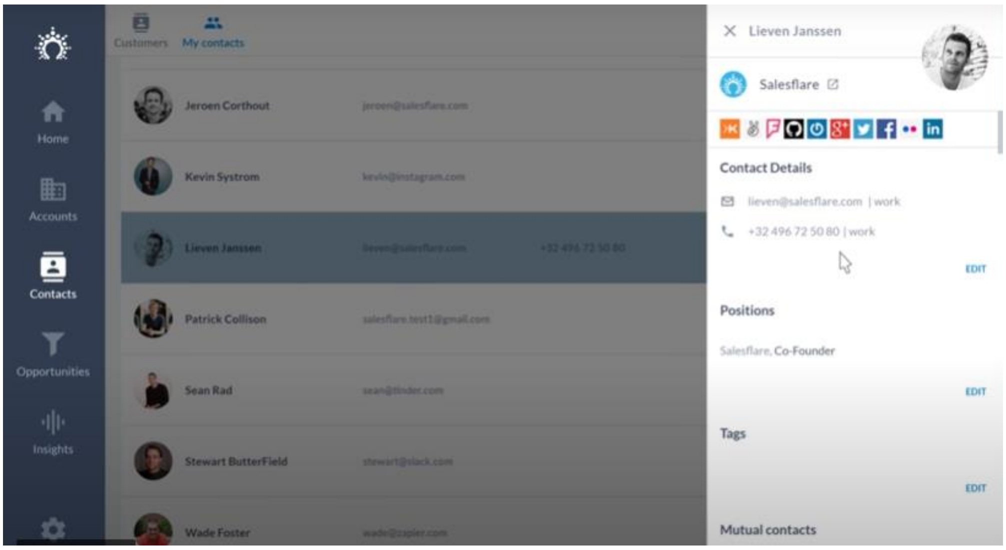


Figure 12. Salesflare Contacts functionality (Website of the Salesflare, 2020)

2. Accounts functionality:

It can be seen in (Figure 13). This section displays all activities, contact meetings and documents regarding each customer. The information be a timeline according to when activities have taken place, making it easy to track what has taken place and when.

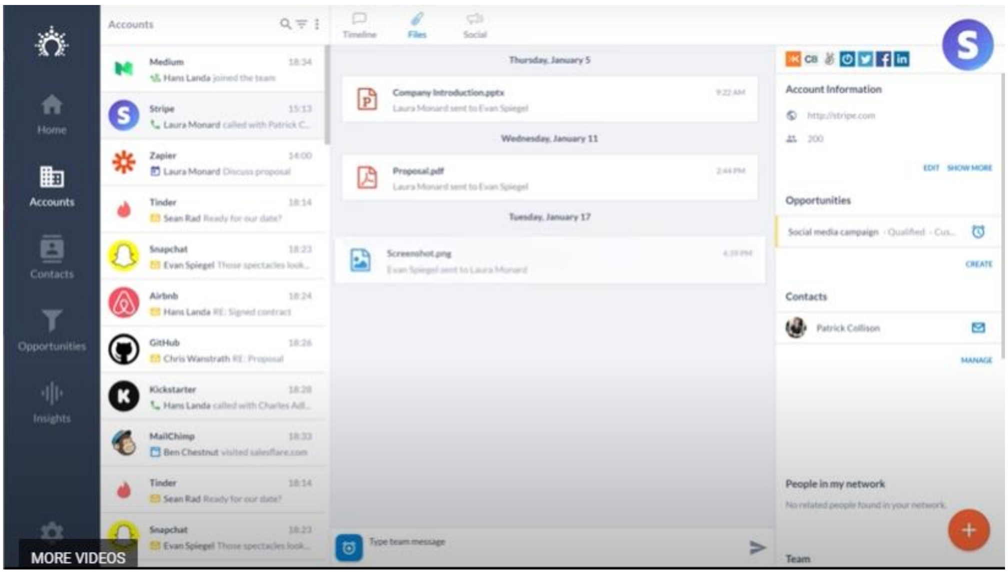


Figure 13. Salesflare Accounts functionality (Website of the Salesflare, 2020)

3. Opportunities functionality

Each contact is assigned a state, which can be Lead, Contacted, Qualified, Proposal made, Won and Lost. Lead is the state for a potential customer, contacted is the state when the potential customer had been contacted, Qualified is the state where the potential customer has been seen as suitable for making a deal with, Proposal made is the state where an offer has been made for the potential customer, Won is the state where the agreement is signed and Lost is the state where the proposal did not lead to a deal. (Figure 14) This functionality makes it easy to see where opportunities exist and helps the user to know where focus and effort should be put.

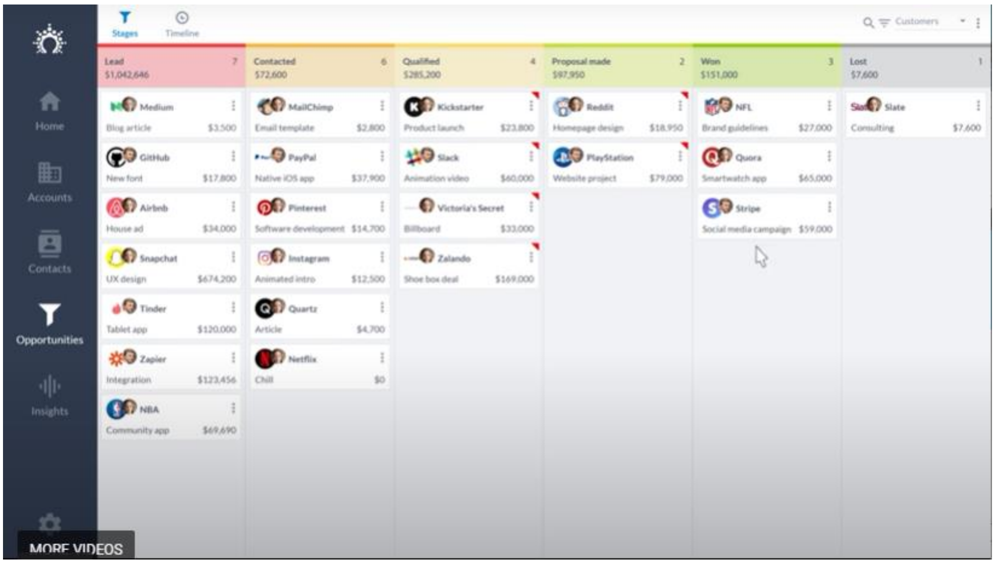


Figure 14. Salesflare Oppurtunities functionality (Website of the Salesflare, 2020)

4. Home functionality:

(Figure 15) Home section gives the user an overview of all actions that needs attention and a timeline view of operations. The actions and events can include necessary information and attachments as needed. This section can give the users reminders to not miss out on tasks.

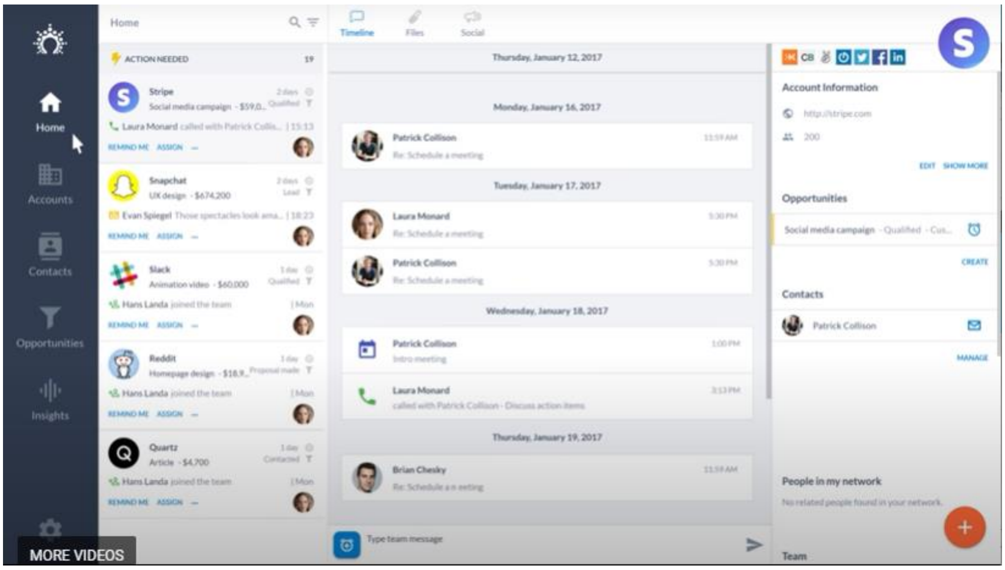


Figure 15. Salesflare Home functionality (Website of the Salesflare, 2020)

5. Insights functionality:

The Insights section (Figure 16) will give the user an overview report in a dashboard style setting with graphical elements providing the information. Examples of provided information are the company's revenue, average sales cycles, number deals won and lost, top list of reasons for lost deals and revenue history for comparison to see if the company is reaching its goals.

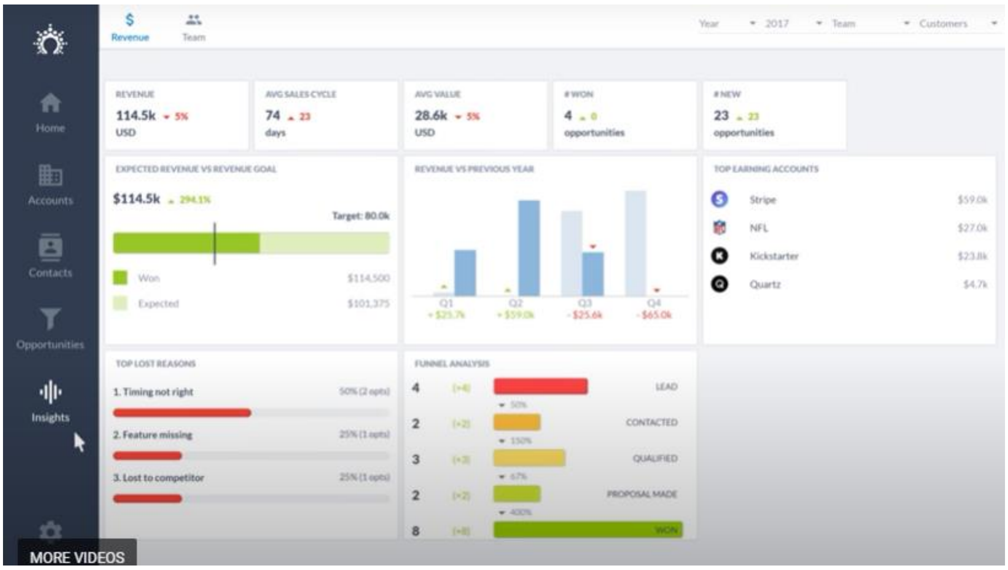


Figure 16. Salesflare Insights functionality (Website of the Salesflare, 2020)

4.3 Pipedrive CRM

According to Pipedrive's Co-Founder and Chairman of the Board Timo Rein (Website of the Pipedrive, 2020), he states "*You can't control results, but you can control the actions that drive deals towards completion*". Pipedrive is a CRM built and planned by actual salespeople, enabling functionality truly needed by sales and a workflow focused on helping to enable new sales. The software puts importance on the sales activities taking place, for example a phone call, a meeting, an e-mail, advertising, or anything else that gets the seller closer to a deal with the customer. The software will remind the user at the appropriate time when a sales task should take place. Real-time performance monitoring keeps track of the user's success rate, in turning leads into customers, and can based on history data to couch the user to better meet future targets. The software also makes it possible to see analytical information about the sales processes, enables time savings by integrating with other tools and automates repetitive tasks. A cost-free trial period is available for 14 days for trying out Pipedrive's CRM software. There are four pricing plans available, each enabling more functionality, ranging from 12.50 euros to 99 euros / user / month.

Pipedrive includes the following functionality:

1. Managing leads and deals

Customizable pipelines enable visualisation to see the progress of the sales activities. (Figure 17) It is possible to track things like win probability and expected sales closing dates for each contact. The user can also add their customized data fields for the contacts. All information for getting new sales is saved in one place, by integrating data import from sources such as e-mail, chat history and telephone calls, all tracked in a timely order. Live-chat and chatbot functionality can also be provided for contacts to easily connect the company to the customers. The creation of web-forms is possible, so that potential customers can enter their contact information and ask for the company to contact them or for more information about products or services provided. Data-fields functionality enables collaboration between team members in the company and makes sure that everyone has access to up to date and critical information needed for the sales tasks. Product catalogue data can also be maintained by use of this functionality, which can be used to find information of for example product availability.

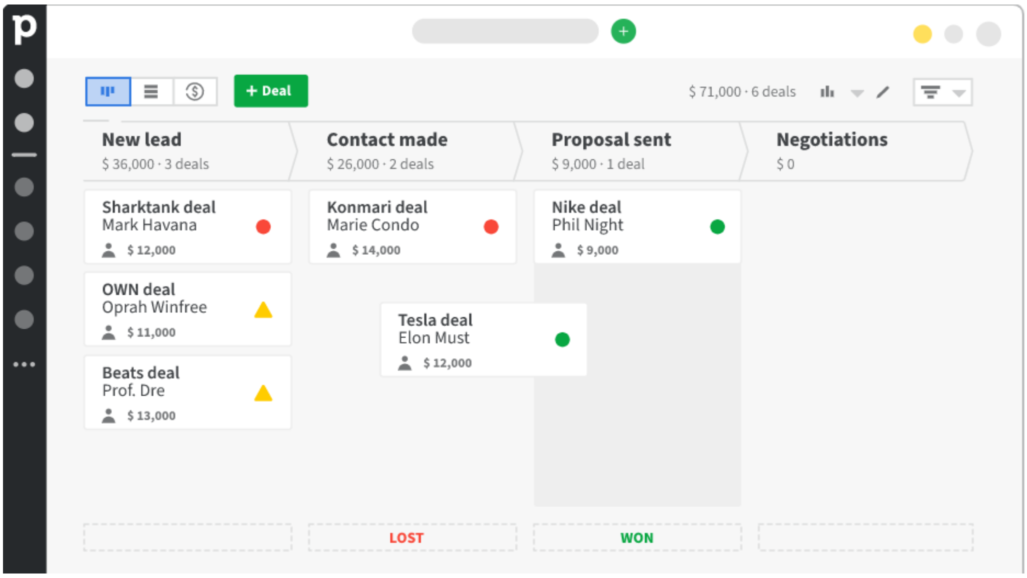


Figure 17. Pipedrive leads and deals managing functionality (Website of the Pipedrive, 2020)

2. Track communications functionality

All information will be maintained in one place but linked to a certain contact or company. This enables easy tracking of communications history, as the history can be displayed for example per contact. Information can also be imported from other sources such as spreadsheets or other CRM applications such as Salesforce and HubSpot. E-mails and group e-mails can automatically be archived and linked to a certain contact's data. The same goes for caller information, such as call times, inbound and outbound call data and calls themselves can also be recorded and saved by the software. Calendar data is managed and tracked, enabling scheduling events, reminder notifications, sharing of the calendar events with other team members for efficient work time management and helping with organizing of sales activities (Website of the Pipedrive, 2020).

3. Insights and reports functionality

Reports can be shown for deals, revenue, activities, and leads. Reporting on deals (Figure 18), show the number of wins and losses, deal dates and total value. Deals reporting also show data on sales cycles, which can help to improve the sales process efficiency. Revenue reporting shows the current turnover and predicted growth, client upcoming payments, as per installation, can also be reported (Figure 19). This allows the user to see potential problems regarding the revenue stream, in time to still react to them.

Leads reports lets the user see where new customers are coming from, which can give a better understanding of the market.

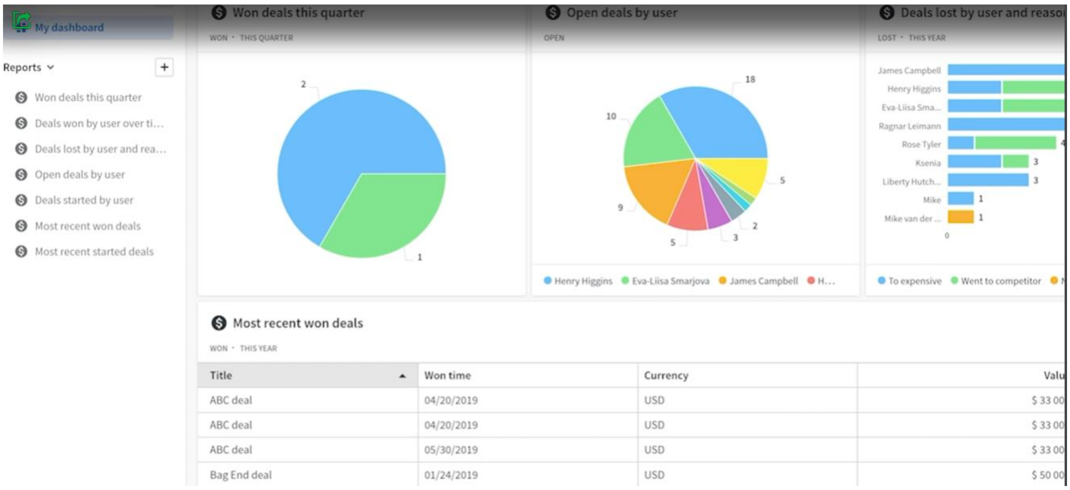


Figure 18. Pipedrive Insights and reports functionality (Website of the Pipedrive, 2020)

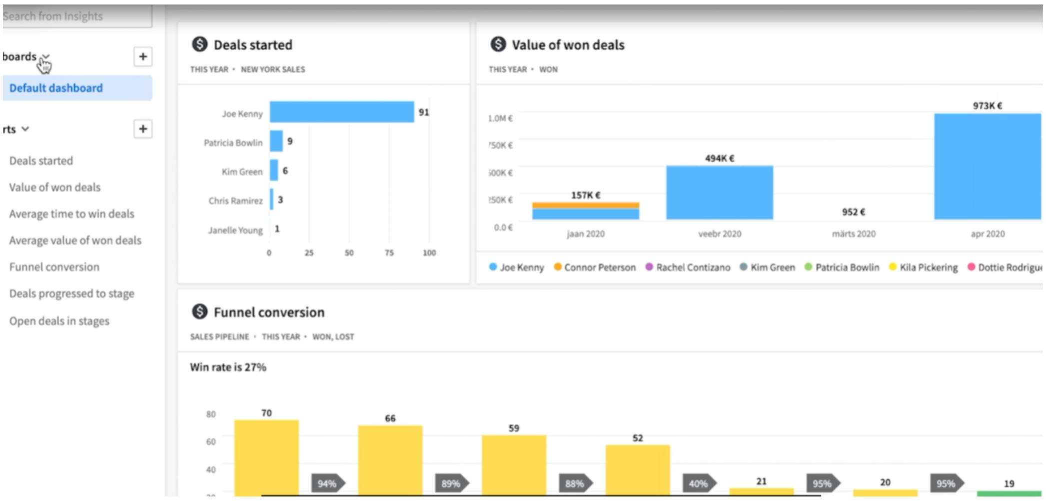


Figure 19. Pipedrive Insights and reports functionality (Website of the Pipedrive, 2020)

4. Automate and grow functionality

The software has built-in artificial intelligence (AI). A sales assistance feature makes use of the AI, which for example can give personalised tips for the user on what tasks to do next, tips on how to improve the efficiency of the sales work and recommendations on what task the user could automize in order to save time. The sales assistance also uses notifications to keep all users on a team up to date with important information, so that all can move in the same direction toward a common goal (Website of the Pipedrive, 2020).

5. Privacy and security functionality

The software provides a built-in security center section, where administrators can monitor real-time and history data regarding data access and use. A security dashboard gives the real-time monitoring capabilities to see who is using the software, what they are doing, what data they access and times when data have been accessed. This allows an administrator to react fast to activities that seem suspicious. The security center also provides automatic notifications of suspicious activity such as a large number of failed logins and other events associated by hacking the system. Security is also increased by for example only allowing certain internet connections (IP-whitelisting), rules for time-restricted access and allowance for only certain users to access the data remotely. (Figure 20) The software also gives automatic tips on how to improve the security of the system and how to keep the data safe.

The following measures for data security are available (Website of the Pipedrive, 2020):

- User categorization and limiting of access according to need
- Two-factor authentication improves security by requiring the user to login both using a password and a one-time generated code sent by e-mail on login for confirmation.
- Single sign-on providers (SSO) can be used to secure the login credentials (Figure 17).
- Automatic account lock-down on multiple failed login attempts.
- Pipedrive’s full commitment to the European Union’s GDPR (General Data Protection Rules). This requires Pipedrive to handle the user data security and privacy according to data and privacy laws and regulations.
- Pipedrive’s CRM software only uses the data for what is needed by the provided software and for nothing else. The data is owned by the user and can be exported or deleted if the user requests so.
- A data security officer is assigned at Pipedrive for full-time attention to data security and privacy matters.

- Data is encrypted while it is saved on Pipedrive’s servers and while the data is in transit over public networks between the user and Pipedrive’s service.
- Pipedrive is using known and established data storage services like Amazon Web Services (AWS) and Rackspace to store the data.
- Pipedrive guarantees that data by European users is stored in Europe.

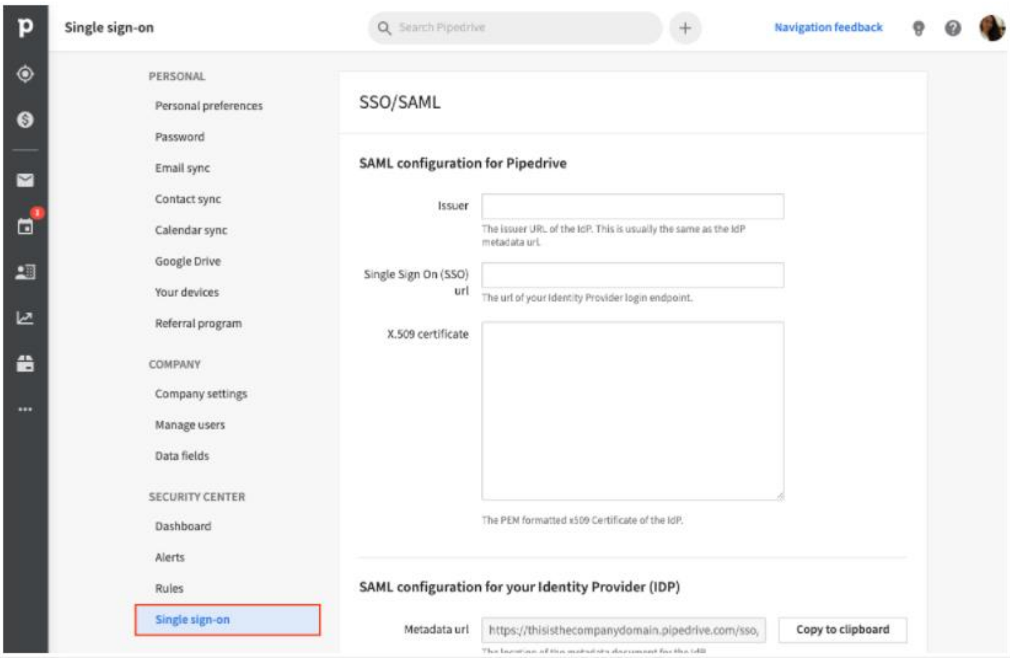


Figure 20. Pipedrive Single Sign-on functionality (Website of the Pipedrive, 2020)

4.4 Analysis, comparison, and solution

All the software candidates were found to provide quite the similar type of service and features. However, through careful and deep investigation, it could be seen that there exist differences between the candidates, in terms of what feature each software puts focus on and the way the provided functionality works.

To be able to find the right fit of CRM software, tables of the candidates' provided functionality are used for comparison.

4.4.1 Deployment platforms

Table 18. Comparison of available deployment platforms.

	HubSpot	**Salesflare**	**Pipedrive**
Cloud-based	X	X	X
Phone application	X	X	X
Local installation		X	

From table 18, it can be seen, that all three software can be used as SaaS (Software as a Service), where the application is used over an internet connection straight from the cloud. Phone based applications that can be installed in a smart phone are also available from all candidates, which makes the software available on the go. Salesflare is the only one that also provides the possibility to install the software locally on a computer server.

4.4.2 Functionality comparison

The functionalities provided by different CRM software can often aim for the same use but what it is called can be slightly different. The comparison of the functionality, done below, uses generalized names for each functionality group. A brief description is provided on what features each functionality group usually contain.

Territory management includes the following functionality:

- Visual mapping of territories
- Optimization of sales bases on territory
- Risk management per territory

Customer management group includes the following functionality:

- Contacts
- Accounts
- Opportunities (leads)
- Sales (deals)
- Service requests/tickets handling
- Scheduling

Tracking data group included the following functionality:

- Calls
- E-mails
- Chats
- Service conversations

Marketing data group includes the following functionality:

- Advertising
- Social media integration
- E-mail campaigns
- Chatbot AI (intelligent automatic answers)

Reporting group included the following functionality:

- Dashboards
- Insights
- Reports

Automation API includes the following functionality:

- Data integration with third party software

Privacy and security built-in include the following functionality:

- Security center
- Real-time monitoring

Artificial Intelligence for Task optimization includes the following functionality:

- Workflow optimization and suggestions
- Task reminders and hints

GDPR group includes

- Certification of compliance with GDPR

Table 19. Comparison of available CRM software functionality.

	HubSpot	**Salesflare**	**Pipedrive**
Territory management			X
Customer management	X	X	X
Tracking data	X	X	X
Marketing	X	X	X
Reporting	X	X	X
Automation API	X	X	X
Privacy and security built-in			X
AI Task optimization			X
GDPR compliance	X	X	X

4.4.3 Cost comparison

Table 20. Comparison of cost available CRM software functionality.

Cost €	**HubSpot**	**Salesflare**	**Pipedrive**
Free version	X		
Monthly payment		35 / user	Essential: 15 / user Advanced: 29 / user Professional: 59 / user
Yearly payment	Starter: 497 Pro: 8880 Enterprise: 35328	360 / user	Essential: 150 / user Advanced: 298.80 / user Professional: 598.80 / user Enterprise: 1188 / user

4.4.4 Risk identification and evaluation

Risk scorecards are used with identified risks entered. Each risk factor will have a score determined, that ranges from 0 to 5. The identified risks will be evaluated separately for each CRM software candidate, using the same the risk score card (Tanhua 2019).

Table 21. Risk score description

Score	**Description of the level of risk**	**Score**	**Description of the level of risk**
0	No risk	3	Medium Risk
1	Little risk	4	High Risk
2	Some risk	5	Extreme Risk

Table 22. Risk scorecard for Hubspot CRM

Index	**Description of risks**	**Score**
1	Likelihood of leaking privacy data	4
2	Difficulty in using software interface	2
3	Expensive software	4
4	Badly working software support	4
5	Customers not satisfied with the company using CRM	3
	Total score	17

Table 23. Risk scorecard for Salesflare CRM

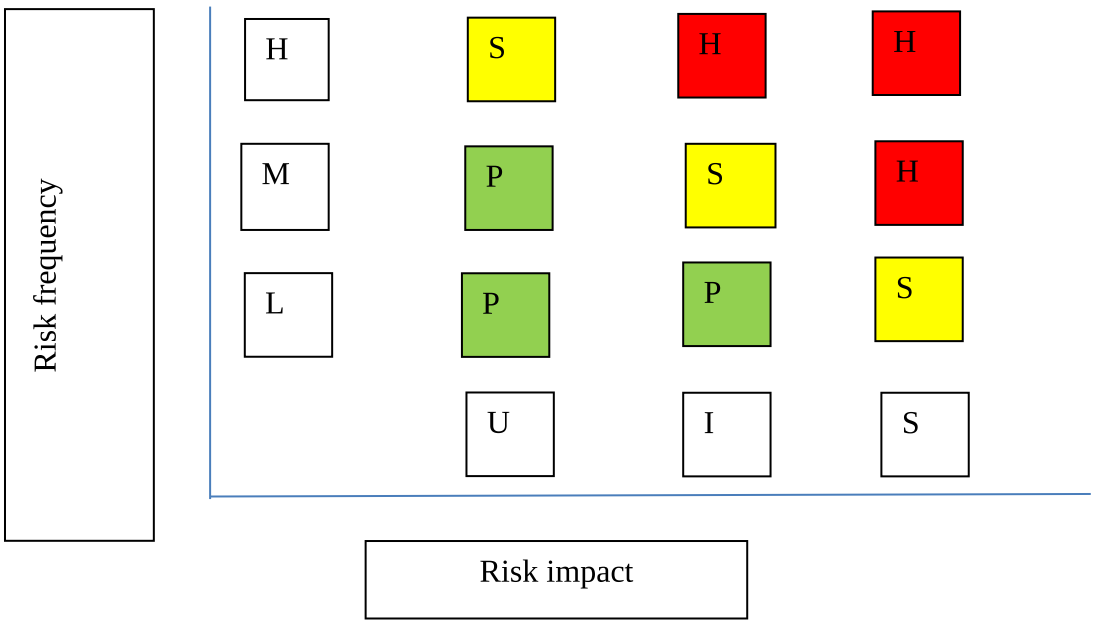
Index	**Description of risks**	**Score**
1	Likelihood of leaking privacy data	3
2	Difficulty in using software interface	2
3	Expensive software	3
4	Badly working software support	3
5	Customers not satisfied with the company using CRM	3
	Total score	14

Table 24. Risk scorecard for Pipedrive CRM

Index	**Description of risks**	**Score**
1	Likelihood of leaking privacy data	1
2	Difficulty in using software interface	2
3	Expensive software	2
4	Badly working software support	2
5	Customers not satisfied with the company using CRM	2
	Total score	9

(Figure 21) Risk mapping is performed to estimate the level of risk, to identify the risks into different severity classes. The risk severity is based on the risk frequency and impact, a higher frequency and impact means that the outcome is more severe if the risk happens. Mapping of risks, enables an overview to easier recognize the risk severity (Tanhua 2019).

Risk mapping of CRM software (Tanhua 2019):



H: High, M: Medium, L: Low U: Unimportant I: Important S: Strong

H Hubspot S Salesflare P Pipedrive

Figure 21. Risk mapping of CRM software

From (Figure 21), one can evaluate on three levels of risk:

- Low risk: Pipedrive and Salesflare are classified with acceptable hazard, which means that some actions are needed but the risk is easy to deal with
- Medium risk: Pipedrive and Salesflare are classified with allowable hazard, meaning that the risk is still manageable
- High risk: Salesflare and Hubspot are classified with unacceptable hazard, meaning that the risk must be first on the list to eliminate if possible, and otherwise prevent as much as possible

4.4.5 Thesis solution

After analyzing, comparing the collected data and after taking into consideration the cost and risks involved with the CRM candidates, the result shows that Pipedrive is the most suitable CRM software for a small healthcare company. Of the three candidates, Pipedrive was seen to contain the lowest risks, and having the lowest cost, while providing all the important functionality required. Pipedrive was also the only candidate to put special focus on data privacy and security matters, by providing built-in functionality for the user to monitor and manage security risks. This result allowed the author of the thesis to have the necessary information needed to answer the thesis questions, to fulfil the requirements.

- How to get the right CRM program for the small healthcare company?
  Answer: The collected data and the analysis performed, allowed the author to be able to select the right CRM candidate for the thesis client, which is Pipedrive CRM. Pipedrive was selected because it had all the required functionality.

- How to measure and estimate the features of the program?
  Answer: To perform the analysis and comparison, each candidates' functionality was listed using tables as tools. This allowed for an overview of the differences and available functionalities of the candidates, that helped to single

out a suitable candidate. The cost, benefits and risks also influenced the decision.

- How to find the suitable solution for input and storage of data?
  Answer: The customer data is especially sensitive for a small healthcare company, as the customers are patients getting treatment. The patient contact information is suitable for entering into the CRM software. The data regarding treatment session and other related data, can also be saved in the CRM as part of the customer information. The information is saved in encrypted form, so it would be quite safe to save in the CRM software, but it depends on the user how they want to save the data. A type of solution here is to use a hybrid system where a CRM software can be used in parallel with some other patient treatment diary system (which can be paper-based or digital). A hybrid system would work together with paper-based documents, by indexing and storing of the paper documents in chronological order.

- How to ensure customer data privacy and following of laws and policies?
  Answer: A requirement is that the software provider should follow EU's GDPR policy and that the user data should be stored inside EU. The selected CRM software, Pipedrive, allows the user to choose to store the data on servers located in EU. The customer data must also be saved in an encrypted form, to prevent the data from being in a readable form, in case of data leaks. Regular data backups must also be taken, to prevent serious data loss.

- How to find new customers and new business growth?
  Answer: The main task of CRM software is to find new leads, convert them into customers and get new sales. This functionality is also suitable for a small healthcare company, allowing them to do marketing through built-in functionality and to make the sales process more efficient.

After evaluation of the CRM software candidates, it was found that Hubspot CRM and Salesflare CRM were less suitable for the client, compared to Pipedrive CRM. The big issue was that the storage location of user data could not be selected by the user for all software.

For example, Hubspot CRM always stored the data located on data servers in USA. This issue is the primary one to consider, as the data privacy required and to prevent leaking of user data is of the most importance for the small healthcare company.
Salesflare had similar functionality, compared to the other two candidates, but considering the cost and higher risk regarding matters of data privacy, as Salesflare has less functionality than the other candidates, like the monitoring tool for security and privacy matters.

5 CONCLUSION AND DISCUSSION

In this thesis, research was done to find an answer to the question of what CRM software could be fit, for the client Psykolog Sabina Westerbäck. The client was looking for a new way of saving patient information, by use of CRM software instead of the current paper-based system. The use of a modern CRM was needed, to manage the existing customers and to find new customers. The thesis provides information from different sources, such as the client company requirements, theoretical literature, and CRM software providers. The law- and regulations were considered, which must be followed to ensure that CRM software could be used for this field of small healthcare companies.

The work done in this thesis can help the client company understand the benefits and importance of what CRM software can provide for them, with the purpose to help the client to consider and decide on if they should take a CRM into use and which CRM software could be the best fit. Qualitative research was used to collect necessary information, such as interviews, surveys, observation, focus groups and usage data. The information was used in the evaluation and comparison of the functionality of the CRM software candidates. The thesis research started out with five possible CRM software candidates, out of which two were eliminated before a thorough comparison of the remaining candidates. The remaining three candidates were evaluated by comparing the provided functionalities, establishing risk scores and risk mapping for each candidate, consideration of user reviews and the cost of the software.

CRM software can be the answer for many small companies (B2C), to make the business more efficient and profitable. The modern trend today is more and more digitalization and a work culture where people work from distance, people are not tied to a certain place anymore. Digitalization and the use of always available on-line tools makes it important for companies to embrace this technology, to become more efficient with a good workflow and to stay competitive. Benefits include making it easy to find new customers, to maintain existing customers, and to save time and cost.

For a small healthcare company, the issue to most consider, is how to safeguard the sensitive patient data. The result of the evaluation showed that using a CRM software could be a good fit for a small healthcare company. The final comparison and analysis showed that the CRM software Pipedrive was found to be a best fit. Pipedrive CRM was most suitable out of all candidates, because it had all the functionality, such as sales, marketing, cloud-based technology, and especially built-in security functionality and safeguard of data privacy, to fulfil the client's requirements, which made Pipedrive CRM the best fit for a small healthcare company.

The following functionality in Pipedrive CRM makes it a good fit for preventing privacy information leaks in health care companies (Website of the Pipedrive, 2020):

- CRM's ability to encrypt information
- Big-data saving capabilities, with the opportunity to select the geographical region for the data-center used to store the data
- Easy to store related information in one place for easy access
- Easy to use user interface, by web-application or local installation, providing guidance and automation of tasks
- Support and training material provided by the CRM suppliers
- Tools for monitoring security related activities and information, both by history data and in real-time

The success of taking a CRM software into use cannot be guaranteed just by selecting a suitable candidate. The successfulness and benefits can only be reached when the user has a clear understanding of the benefits and the knowledge of how to use the CRM software. The history of CRM reaches back several decades but could be further researched with special attention on small healthcare businesses, as it was found that no providers have a special focus on this business area.

It was surprising to find out, while doing the thesis work, that the regulations and laws in place for small healthcare businesses, is not stricter regarding safeguarding customer privacy data. Only following the GDPR set out by the European Union, cannot be enough to guarantee privacy of customer data, because there is no-one actively monitoring that small healthcare companies follows it (Website of the General Data Protection Regulation 2020).

While working on the thesis, it was found out that paper-based documentation must be saved for at least ten years, according to laws that psychology companies in Finland must follow. Finding information from a paper-based archive, is not easy or efficient, because of the time it takes. The solution provided by the result of this thesis, could be the right tool to solve the problem of managing the company efficiently (Ministry of Social Affairs and Health, 1994).

A bottleneck while doing the thesis, that slowed down the work process, was that at the beginning of the phase to collect information, it was difficult to start choosing which CRM software providers to evaluate, because there is many CRM software on the market to pick from. By use of the website service for software reviews, it helped the author to get back on track and to find the needed information.

The result of the thesis can be quite reliable, because the thesis author tried out the CRM software candidates (trial versions), to make sure that the listed functionality was present and that the requirements were fulfilled. Also, the focus groups contained information provided by many users, which makes the overall review scores believable. The thesis work also took into consideration the risks of the CRM software, which makes the result more reliable.

Implementation and taking into use the CRM software, was not part of this thesis work, but the information provided in the thesis, could help the thesis client company to make a right decision on what CRM software to use and to know what things to consider before starting the implementation.

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APPENDIX 1

Questions for the interview with the thesis client company:

- What does your company do?
- What type of process is common with the clients?
- What are the main requirements to find a solution for?
- How do you store the customer patient data?
- For how long do you need to keep the customer patient data?
- What type of information is stored?
- Are there laws and regulations that "Psykolog Sabina Westerbäck" must follow?

Question for the interview with the IT-developer:

- Is CRM software in general suitable for a small healthcare company?
- Is CRM software easy to use and easy for users to learn?
- Do you think that CRM software can help with finding new customers?
- Is it safe, regarding customer privacy data, to use CRM software?
- Can CRM software connect to other programs, for example for importing contact information?
- What is recommended, to make a custom-made CRM solution or to use a ready-made CRM solution?
- What is the opinion, on if it would be worth it for a small healthcare company to change from a paper-based system to a CRM software?
- Can you make any recommendations to what CRM software would be suitable in this case?