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Managing customer relationship management projects: The case of a large French telecommunications company

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Abstract

Customer relationship management (CRM) implementation projects reflect a growing conceptual shift from the traditional engineering view of projects. Such projects are complex and risky because they call for both organisational and technological changes. This requires effective project management across various phases of the implementation process. However, few empirical researches have dealt with these project management issues. The aim of this research is to investigate how a "project team" manages CRM implementation projects successfully, across the different phases of the implementation process. We conducted an in-depth case study of the "Firm-Clients Branch" of a large telecommunications company in France. The findings show that, to manage CRM implementation projects successfully, an integrated and balanced approach is required. This involves appropriate system selection, effective process re-engineering and further development of organizational structures. We highlight the need for a "technochange approach" to achieve successful organisational transition and effective CRM implementation. The study reveals that the project team plays a central role throughout the implementation phases. Furthermore the effectiveness of technochange depends on project team performance, technology efficiency and close coordination with stakeholders.

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1. Introduction

The implementation of customer relationship management (CRM) is increasingly taking centre stage in organisations' corporate strategies (Greenberg, 2002; Bohling et al., 2006). It aims to create, develop and enhance personal and valuable relationships with customers, by providing personalised and customised products and services (Goodhue et al., 2002; McKim, 2002). CRM is an integration of technologies, people and business processes that is used to satisfy the customers' needs, and to improve interactions with clients (Bose, 2002; Foss et al., 2008; Becker et al., 2009). Often built around complex software packages, such CRM systems promise to enable companies to respond efficiently, and sometimes instantly, to shifting customer desires, thereby bolstering revenue and retention, and reducing marketing costs (Rigby et al., 2002).

Despite the availability of successful and more reliable technologies, and companies' use of external skills that are recognised on a technical level, managing CRM implementation projects remains a risky undertaking (Corner and Hinton, 2002; Bull, 2003; CSO Insights, 2006). In fact, the introduction of large-scale integrated IS leads to more significant changes in processes, tasks and people than traditional computing projects (Winter et al., 2006).

The organisational change associated with the implementation of integrated information systems (IS) takes place through an adaption of the business processes, and a reconfiguration of the company's organisational structure (King and Burgess, 2008). Because of this, the

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implementation of new CRMs transcends the technical dimension that characterises computing as encompassing human, organisational and strategic factors (Chen and Popovich, 2003; Mendoza et al., 2007). Nevertheless, organisations have a tendency to concentrate on the technological aspects, and to see CRM systems mainly as computing projects when implementing them (Gartner Group, 2003; CSO Insights, 2006). King and Burgess (2008) specify that a CRM implementation has similarities with an ERP, in terms of their respective critical success factors (CSF). However the authors point out the under-consideration of the competence and management of the project team in the CRM work compared to that of ERP. For example, in ERP literature, Somers and Nelson (2001) argue that project team's competences are a primary CSF for ERP implementation projects. Somers and Nelson (2004) specify the need to related project team's activities to the project life-cycle. This is in line with Gareis and Huemann (2000) who shed light on the need for, and the particularity of, project management competences in project-oriented companies. The preeminent role of project management is confirmed by studies dealing with CRMs (Bose, 2002; Mendoza et al., 2007). Payne and Frow (2005) argue that successful implementation of a CRM programme depends on four critical factors: (1) CRM readiness assessment, (2) CRM change management, (3) CRM project management, and (4) employee engagement. Foss et al. (2008) remark that poor planning, lack of clear objectives and failure to recognise the need for business change are the key reasons for CRM failures. As an enterprise system, the responsibility for managing CRM implementation project is often assigned to a dedicated project team. The business and managerial activities of this team are increasingly considered a critical factor in enterprise systems' implementation success (Ward et al., 2005; King and Burgess, 2008). CRM implementation projects are difficult endeavours because they call for both organisational and technological changes (Bull, 2003). Markus (2004) calls this a technochange (i.e., technology-driven organisational change). Winter et al. (2006) refer to these as "business projects", which are considered a new class of projects that reflects a growing conceptual shift from the traditional engineering view of projects. However, few empirical researches examine the management of CRM-related changes (Chen and Popovich, 2003; Bose, 2002) or of CRM implementation projects (Bygstad, 2003), within a holistic perspective (Becker et al., 2009) that integrates technological, organisational and technochange issues. Even such a required change relates, according to Gareis (2010), to several change dimensions the identity of an organisation is not changed by a CRM implementation. Therefore, in our research, the CRM implementation is considered as a first-order change (Levy and Merry, 1986).

This study aims to address the gap above by dealing with the context of the increasing importance of CRM implementation projects, the inherent change issues related to its different phases and the central role of project management, as a key to success. Our objective is to investigate the following question: How does a "project team" manage a CRM implementation project and the adaption of the organizational structures throughout the different phases of the implementation process? The paper analyses the dynamics of a CRM implementation project by deploying a process-based approach. We undertook a case study of the project of implementing a new CRM system in the "Firm-Clients Branch" of a leading French telecoms company. This large Branch sells products and services to firms.

The remainder of the paper is organised as follows. Section 2 provides a literature review of (Section 2.1) the change dimensions associated with the CRM implementation, and (Section 2.2) the role of the project team in the management of these dimensions over the implementation process. Section 3 describes the case study method adopted for this research. Section 4 highlights the findings of the study. Section 5 discusses the main findings and draws the conclusion of this study.

2. Literature review

Van de Ven and Poole (1995, p. 512) define change as a type of event in which the form, quality or state of an entity differs over a period of time. Van de Ven (1992) stated the need for much more research on whether the adaptation of firms to environmental changes will lead to second-order change (the social system itself changes), or to less drastic change (a first-order change that occurs within the social system itself). For example, Fox-Wolfgramm et al. (1998) observed both incremental (first-order) and punctuated equilibrium (second-order) change modes, although only incremental change was sustained on the basis of case studies. Second-order change is crucial and not uncommon, but it is not the norm (Meyer et al., 1990, 1994). Hence Fox-Wolfgramm et al. (1998) alert academics to the risk of under-estimating first-order change in response to environmental upheaval. Like these authors, we attempt to present a more balanced perspective. Rather than underline second-order change (an analysis of which is provided by Gareis in this special issue), we emphasise first-order change. The latter (as opposed to a second-order change) consists of "*the improvements and adjustments that do not change the system's core, and occur as the system naturally grows and develops*" (Levy, 1986, p. 5). We focus on the analysis of the change dimensions, and on the process by which CRM systems are implemented. Bygstad (2003) argues that the research on CSFs does not provide much guidance on how CRM systems should be implemented. Lucas (1981, p. 14) called IS implementation "*an ongoing process which includes the entire development of the system from the original suggestion through the feasibility study, systems analysis and design, programming, training, conversion, installation, and evaluation of the system*". Based on the models of Lewin (1947) and Kotter (1996), and the concepts of Heitger and Doujak (2008), Gareis (2010) proposes

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