

# SALES PEOPLE AND CRM SYSTEMS IN B2B CONTEXT – THE INTERPRETATIVE STUDY <sup>1</sup>

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## **Abstract**

Relationship-based business structures, strategies and systems are universally recognized and still growing research field in the context of business-to-business markets. Management scholars use many methodological approaches towards studying relational phenomena. One of the most utilitarian approaches refers to Customer Relationship Management (CRM) concept and systems of the company oriented at maintaining and developing relationships with customers. This paper is focused on implementation of CRM systems in companies operating in B2B markets with special attention to using these systems by sales people. The study was conducted in Poland and had explorative character. The focus group method was used.

The research results support the complicated vision of using CRM in the company. It is suggested to treat the implementation of CRM as the source of both: opportunities and threats. Most of revealed CRM opportunities correspond with prior studies in this area. The originality of the research may be perceived in investigating opinions of front-line employees which were usually neglected in the literature and exploring some negative aspects of implementing CRM treated as IT system and/or business strategy.

**Keywords:** CRM systems, B2B, sales representatives

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# **SALES PEOPLE AND CRM SYSTEMS IN B2B CONTEXT – THE INTERPRETATIVE STUDY<sup>2</sup>**

## **Introduction**

One can still observe increasing attention to the nature, antecedents and effects of customer relationships in marketing theory and practice (Johnston & Hausman 2006; Bonner & Calantone 2005; Stanko, et al., 2007; Mitreġa & Katrichis 2010). The relationships with counterparts (customers, suppliers and horizontal alliance partners) are treated as the crucial research field especially by academics specialized in business markets (B2B), where so called Markets-as-Networks approach (in contrast to transactional approach to consumer markets) has been developed since 70-ties (Hökansson & Ostberg 1975). The researchers studying B2B area incorporated insights from Social Network Theory and Transaction Costs Theory and they conceptualized the environment of company as the non-anonymous set of relationships with various organizations which influence influencing the company performance in B2B market (McLoughlin & Horan 2002). Also managers put more attention on business customers which become the strategic asset of the company. The managers started to develop various programmes oriented at most profitable customers ranging from joint product-development and individualized post-sale services, through Key Account Management (KAM) practices to just-in-time delivery IT-based systems. Some scholars have fully accepted relationship-based company strategies as new marketing paradigm (Grönroos 1997; Gummesson 1997), however general axioms of relationship-based strategies have been accused of being over conceptualized and underdeveloped empirically (Saren & Tzokas

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1998; Hibbard, et al., 2001). As Hibbard et al. suggested (2001, p. 30) "...a more nuanced understanding of marketing relationships is needed".

There are some different scientific approaches toward relational marketing phenomena. The most evident differences may be found between: Customer Relationship Management (CRM), Relationship Marketing (RM) and Interaction Approach to Marketing (mainly IMP approach). The CRM concept is generally based on the assumption that the company may effectively manage portfolio of customer relationships. We are aware of the fact that the concept of the focal company managing relationships is criticized by some authors (Ford, et al., 2003; Waluszewski 2004; Ford & Mouzas 2007), however we will follow this approach because it received high interest not only from scholars but also from business practitioners. Moreover, implementation of CRM is very complicated and consequently, factors influencing this implementation may be treated as important research area.

On the one hand, CRM implementations seem have the capacity to improve management performance (Buttle & Ang 2002; Aizcorbe 2007; Vesalainen & Kohtamäki 2009). On the second hand, many researchers have noted that majority of CRM projects fail (Zablah, et al., 2004). As Chalmeta (2006) suggests, one of the main reasons for this lack of success is the use of simplistic approach to CRM implementation, as it does not integrate strategic and technological aspects of CRM, while often fails to involve final users in designing the CRM solution.

The study presented in the paper is the qualitative and interpretative in nature which is well suited to poorly explored areas (Sandberg 2005; Giroux 2009) such as using IT-based CRM systems by sales people. By concentrating on IT-based tools from the perspective of people directly involved in relationships with business customers this study integrates technological and human aspects of CRM implementation. Because there were almost no studies revealing free opinions of sales people about using CRM systems in B2B setting, the

literature review presented in the paper is not limited to sales people perceptions on CRM. Taking into consideration that importance of exploring perspectives of sales people on CRM may be questioned, the authors justified their research approach by first presenting the complexity of CRM as the business tool and then the meaning that sales people play in marketing in B2B context. This is followed by presenting results of prior (mostly quantitative) studies about benefits and problems of using CRM systems by sales persons. Then, the interpretative research design and research results are elaborated. At the end of the paper research discussion and conclusions are drawn.

### **CRM as the complex business tool**

There is no one widely accepted definition for CRM (Karantinou 2010), but generally CRM comprises the organization, processes, and systems through which the company manages relationships with its customers (McDonald & Christopher 2003). Although philosophically in line with relationship marketing, the focus in CRM is on technology, particularly the technology which attempts to manage all customer contact points and provide a multidimensional knowledge about customer (O'Malley & Tynan 2003) through combining the IT systems relating to the customer interface (McDonald & Christopher 2003, Karantinou 2010).

The level of IT support needed for successful implementation of CRM is dependent on the scale of activity and the type of customers that company deals with. In some small enterprises, which operate on the local or regional scale (like local hairdresser), information about customers may be probably stored just in minds of employees, sales documents or simple electronic spreadsheets; but for companies that cooperate with thousands of customers or/and deal with big industrial customers, the implementation of more sophisticated and expensive IT systems seems necessary.

The keys to successful implementation of CRM are: strong executive and business-unit leadership, careful strategic planning, clear performance measures, and a coordinated program that combines organizational and process changes with the application of new technology (Rigby & Ledingham 2004). Of course, IT systems are just a tool, which has to be operated by people. Therefore, CRM implementation must be initiated by careful preparation of employees, which become involved at various stages of gathering, implementing, analysing and using customer data in decision making. Harris and Ogbonna (2000) point at HRM or internal marketing processes as crucial factors for CRM projects' success. If the staff is not well trained, motivated and coordinated by the project leader, even the most expensive computer systems may become pure loss of resources. It is suggested by Matta and Ashkenas (2003) that it may turn out that the salespeople won't enter in the requisite data because they don't understand why they need to. This very problem has, in fact, derailed many CRM programs at major organizations.

### **The role of sales people in B2B marketing**

Developing attributes and attitudes of sales personnel are discussed as important in various business settings under the label of personal selling (Kotler 1984), however they seem to have greatest impact on marketing performance in B2B exchange (Fill & Fill 2005). According to Brennan, Canning and McDowell (2007) the salesperson might augment the supplier's product recommending optimum solutions to customer sourcing problems. Sales representatives also perform an important role in maintaining customer data and handling of complaints received from customers. Similarly, Michel et al. (2003) point to the importance of the interpersonal dimension of B2B relationships. They suggest that the number of people involved in the relationship is often high on both sides, which refers to the existence of a supplier's selling centre that is able to meet the demands of a customer's decision making

unit. The relationships between those involved is an indication of the importance assumed by the social exchanges, required as much for the technical elaboration of solutions as in the construction of reciprocal confidence upon which the efficiency of the exchange process relies.

The way in which the role of sales persons in marketing is perceived is changing. Nowadays sales people in B2B area are expected to operate rather as consultants who deliver multidimensional value to buying companies than dealers of some standardized products that they were in the past. It is suggested that sales people should support buying companies in their manufacturing as well as marketing activities (Jones, et al., 2005; Anderson & Dubinsky 2004). There is a presumption that should drive sales people attitude towards buying customers, that improving the market position of buying company is beneficial or even necessary for better performance of selling company. It means switching to more win-to-win thinking than short-term transactional approach.

According to Palmatier et al. (2006) the sales expertise concept (knowledge, experience and overall competency of seller) was confirmed, in various market settings, to be one of the strongest antecedents of customer commitment, trust and relationship satisfaction. From results of other research (Newman, et al., 2005) it seems that business customers place more emphasis on "personal communication", "personal interaction" and "personal understanding" than on formal information sharing which is sometimes treated as cornerstone of business-to-business communication (e.g. Anderson & Narus 1990). Thus, there is probably a need for theoretical differentiation between formal and informal communication (Newman, et al., 2005). The research conducted by Plank and Newell (2007) suggests that the social conflict within inter-firm relationships decreases the loyalty in the relationship. Summarizing, prior researches support the thesis that sales representatives should be treated as the neuralgic component of marketing in the context of business markets. Abilities and attitudes of sales

staff constitute “social dimension” of B2B relationships which may be stimulator as well as restriction of relationship development.

### **Benefits and problems of using CRM systems by sales persons**

Today sales people have to use IT-based business systems like every other group within organization boundaries. They are probably the crucial group using CRM systems, because they are responsible for delivering latest information about customers to the system. Of course, the procedures of delivering that data and the amounts of data expected are different in various organizations and they are mostly dependent on such factors like: organizational strategy or organizational culture. There were some recent studies about the adoption of IT systems by salespeople. They were oriented mostly at investigating factors affecting the acceptance and level of usage of IT. Speier and Venkatesh (2002) found that immediately after training, sales people had positive perceptions of the technology. However, six months after implementation, the technology had been widely rejected, and salesperson absenteeism and voluntary turnover had significantly increased. Moreover, the results of the research support the hypotheses that individual characteristics and role perceptions of sales people have significant influence on some dimensions of sales people’s individual perception of technology. Correspondingly, Jones, et al., (2002) found that salespeople personal innovativeness, attitude toward the new IT system and facilitating conditions have an impact on infusion of new IT system. According to Buehrer, et al., (2004) higher productivity/efficiency is the main reason why salespeople use technology, the lack of management and technical support is the main barrier to usage, and training is most effective in increasing usage of IT by sales people.

There are also few recent empirical premises about the effects of using IT systems by salespeople. From the results of research by Speier and Venkatesh (2002) it seems that

salesperson-technology fit has a positive influence on objective sales performance. According to another study, conducted by Rapp, et al., (2008), using CRM systems stimulates sales people to use adaptive selling and through this it has indirect positive impact on salespersons' performance. It is suggested that salespeople can benefit from CRM systems by using the customer information to make their sales presentations more adjusted to individual preferences of people from buying company and, as the result, more effective in long-term perspective.

Summarizing, the CRM concept strongly suggest the IT systems as useful tool for accomplishing tasks of sales people. There were just few recent studies which support empirically acquiring some benefits as the results of using CRM systems by salespeople and there is evidence of significance barriers of adoption for these systems connected much more with the human than technological dimension. In the field of using CRM systems by salespeople there is a lack of qualitative studies which could put more emphasize on the way that salespeople really perceive adoption of these systems. More specifically, there is lack of interpretative studies in the field discussed in this paper which are suitable to under-investigated organizational and management issues (Sandberg 2005; Giroux 2009). This approach clearly contrasts with quantitative studies which usually impose some meaning or values on the research participants. We argue that using CRM systems as the research object may be approached from many different angles. There is still place for exploration which may picture more negative dimensions of CRM systems usage. It corresponds with suggestion made by Morgan and Hunt noticed (1994) in the context of relationship-based marketing: "just as medical science should understand both sickness and health, marketing science should understand both functional and dysfunctional relationships".

Having explorative character the study presented in the paper is oriented at investigating some potential benefits and threats resulted from using CRM systems as perceived by salespeople.

### **Research Method**

Interpretative approach took form first at all in describing research phenomena in the meaning given by the people directly involved in buyer-seller relationships and experienced in using CRM-type IT systems (Gray, 2004; Rahimnia, et al., 2009). Being aware of constitute nature of language as the assumption of interpretative research (Hatch 1997) we used only open-ended questions while interacting with research participants.

The focus group with 9 employees from the supplier companies which implemented some CRM-type IT systems was carried out. Selection of research participants was based on rather broad definition of CRM-type IT systems which means we treated IT system used in the company as the CRM system when it at least involved systematic developing customer profiles by sales people and such customer database was used by people from marketing department in some general campaigns. Due to the trade secret issues the companies involved in the study did not reveal details of their CRM systems in terms of money spent on purchase and implementation or specific IT providers being chosen. The authors were provided with general knowledge that all companies used individually designed IT systems, which suggest rather rich functionality of such systems and possibilities of taking advantage of most of potential advantages of CRM business strategy.

The focus group allowed the sales persons perspective on using CRM systems to be discussed. Only sales representatives or other employees involved directly in contacts with buying companies were involved in the focus group. Inviting sales representatives to take part was motivated by the importance of frontline employees suggested in the literature and by the

chance to identify also some operational issues. Participants did not know each other before the focus group. The group was balanced in terms of gender and quite homogeneous with regard to the social status and age (all persons were around the age of 30 and held similar positions within management hierarchy). The research participants represented companies which all were based in Poland but they operated in business sectors highly differentiated in terms of levels of competition intensity. The non-random selection of companies was based on the desire to include both: participants from highly competitive sectors (i.e. hotels, financial services) and participants from highly concentrated - oligopoly sectors (i.e. coal mining, natural gas supply). The assumption was to include companies from three main business areas: service (i.e. quality management certifying), distribution (i. e. steel materials delivering) and manufacturing (i.e. producing sheds to be installed on bus stops).

The focus group was moderated by the researcher. Following the hierarchy of interview questions suggested by Cooper and Schindler (2006) broader questions started the focus group. It was designed to put participants at ease and give them a sense that they have a lot to contribute, followed by increasingly more specific questions. With reference to Mariampolski (2001) word association technique was treated as suitable to explore a range of attitudes of business representatives towards building customer relationships. The focus group participants were encouraged to describe all threats and opportunities associated with using CRM systems by them. Participants discussed both positive and negative aspects of business relationships. The moderator used large sheets of paper, on the wall of the room in which the focus group took place, to identify some of the major trends in the discussion. The participants were asked to confirm if all the important aspects of business relationships were identified. To minimize the influence of the group leader the moderator motivated each participant to indicate freely her/his opinion about the issue even if this opinion might sound strange or difficult to understand. The group discussion was recorded using audiotapes.

Following Fuller (2000) the content analysis was done on the day just after the focus group discussion. No special computer software assisted content analysis. The results as well as the procedure of group interviewing were discussed with experienced researchers from the Marketing and Market Research Department. The discussion allowed for better structuring of research categories. Following the suggestion by Stake (1995) with regard to interpretation of results, we developed some narratives related to research categories and we presented them in the research results part of the paper.

### **Research Results**

During the focus group the issues of existing benefits and threats of using CRM systems with regard to business customers were discussed. The effect of using CRM which was treated as most important and spontaneously discussed was *acquiring access to detailed knowledge about buying company*. Research opined that customer knowledge has great business value because it allows for better tailoring the offer and it refers to real buying needs and expectations, the structure of decision making process and the status of relationships with competitive providers and other stakeholders (i.e. requirements of key entities within the international value network through which the buying company generate profits). In their opinion the depth knowledge about customers is tacit. It is impossible to transfer through the purchase of some external databases. Accumulating and using customer knowledge seem to be useful not only in developing positive emotional tone of the relationship but also *prevent the business customer from switching to other sellers*, which are perceived by customers rather as “anonymous subjects” than “business partners”. As the result *the patronage concentration increase* was indicated as potential positive effect of using CRM systems in the company. If people from cooperating companies get to know each other better, the inter-organizational trust is likely to be developed. Once it is established, there are more

opportunities for developing long-term value of relationships in terms of “*up-selling*” and “*cross-selling*”.

The research participants were sure that apart from opportunities, using CRM systems should be treated as the source of some serious barriers for sales people and barriers or threats for the whole selling companies as well. The discussion of barriers and threats of using CRM aroused great excitement among the focus group participants. As a first factor “*internal communication problems*” were identified and discussed. In the opinion of sales representatives, the most important communication barriers appear in the downwards communication within the organizational hierarchy. The sales representatives suggested that it is usually difficult to see, how their efforts to develop customer databases influence customer-oriented campaigns planned by marketing managers. The focus group participants agreed that many times they do not understand the strategy of their companies and they are not sure what the motives or objectives of established marketing projects are.

Sales representatives felt that, among all other departments in the company, they are closest to the customer and this is why their knowledge is priceless. They meet customers daily and the newest information gathered by them should be treated as a basis for planning processes. Most of interviewed sales representatives confirmed that their companies established various sales reporting systems but in their opinions, *information gathered by them about customers is not used in marketing planning*, but mostly to control sales representatives. Furthermore, using CRM systems is perceived by sales representatives as *very time-consuming*. They do not perceive positive relation between their efforts and activities from people from other departments which makes them treat CRM systems as *a sign of the bureaucracy* that does not stimulate the growth of the company.

During the focus groups “*restricted authority*” of front-line employees was treated as a serious disadvantage of implementing CRM philosophy. The most difficult issue for sales

representatives was that during the negotiations with customers they had to consult with their superior or even with the president of the firm about many things. One of the representatives used the following words to express that issue: “I perfectly know that I will be able to offer the given discount to a customer, but to make it real, obligatory I have to get the signature of the member of the management board. It is simply a waste of time. Of course this problem may appear at every stage of contact with the customer and sometimes this may make the customer feel that I am not a reliable person”. The sales representatives argued that the customer usually wanted to solve his/her problems only with one person in the company. In their opinion, if the customer has to confirm many things with different people, it is usually perceived as a bureaucratic waste of time.

As a matter of fact, some factors which were indicated by participants did not refer only to using CRM computer systems but they were connected to idea of developing long-term customer relationships as the core of CRM business strategy.

Most of the participants confirmed that they experienced real disadvantages connected with their efforts to create long-term, loyal customer relationships. In their opinion, it is quite typical for some customers that the expectations towards them personally and towards the company increase in life-cycle of the relationship. Some customers manifest even *more transactional approach* than at the beginning of the cooperation: “When I come to them again they wait continuously for more and more. This can be very difficult because my possibilities are limited”. Some sales representatives, pointed at the problem that getting closer to the customer may also mean *losing privacy*: “If we get to know each other better, sometimes there is an expectation that I do not have my own private life and always if he/she wants to drink vodka with me I have to be ready. It may sound funny but in practice it may be hard thing to manage, if you have a family”. Participants argue that getting closer to the customer may make the customer *more resistant to persuasion* so it may be more difficult to

negotiate with this customer some crucial issues if there is time for that matter. *Over-developed interpersonal dimension of the relationship* may also become a disadvantage when some strategic changes in organizational structures of cooperating companies take place. “If the cooperation between companies is fully based on personal ties, it may be really risky for the business. If my friend in the company X is transferred to other position in the company or simply leaves from work (...), that would be very difficult”.

### **Research results discussion and conclusions**

The results of the study presented in the paper support the complicated vision of using CRM in the company. It is suggested to treat the implementation of CRM as the source of both: opportunities and threats. The originality of the research may be perceived in investigating opinions of front-line employees, which were usually neglected in the literature and exploring some negative aspects of implementing CRM treated as IT systems and business strategy.

The revealed positive aspects of using CRM which were indicated by focus group participants: developing customer knowledge, decreasing customer switching behaviours, higher patronage concentration, more valuable and wider purchases; correspond with behavioural, as well as with financial aspects of inter-organizational relationships. It is consistent with some prior studies in the area of effectiveness of relationship-based strategies in B2B context (Hibbard, et al., 2001; Palmatier, et al., 2007; Mitrega & Katrichis 2010), however, to the best knowledge of authors of this paper, they were yet discussed mostly from the perspective of managers not from the perspective of people directly involved in the selling process. This paper move forward our knowledge about implementation of CRM systems and contrary to some prior studies (Speier & Venkatesh 2002; Jones, et al., 2002), it

identifies main barriers of implementation of CRM systems not in characteristics or attitudes of sales people but rather in interactions between sales people and other employees/departments as well as with negative mechanisms resulted from maintaining relationships with the same customers.

The customer knowledge presented in our study as the crucial component of relationship-based marketing strategies and systems is related to the study of Liyun et al. (2008), who introduced the concept of customer knowledge management (CKM). It is suggested, that customer knowledge management (CKM) is the extension and further development of CRM (e.g. Liyun, et al., 2008).

The large stream of research has argued that close, co-operative relationships between buyers and suppliers or channel partners yield benefits to all parties involved. Some researchers, however, believe that this rosy view of relationships goes too far. It is speculated that partners in a long-term relationship may develop a "what have you done for me lately" attitude, which paradoxically makes them more sensitive to short-term costs and benefits (Gruen, et al., 2000). It was confirmed through longitudinal study that with a long-established business relationship, they may be expected diminishing benefits. The link between the relationship variables and performance becomes progressively weaker (Hibbard, et al., 2001). The results of focus group presented in this paper seem to correspond well with these doubts concerning benefits of implementing CRM. In opinion of sales representatives some long-term customers manifest more transactional approach than at the beginning of the cooperation. Additionally, the research results point at the problem of personal structure of interorganizational bonds. In close buyer-seller relationships there is a serious threat the customer will be lost if the representative of the buying company changes his position in the company or switches to another one.

This explorative study contributes to prior researchers about adoption of CRM systems among salespeople by pointing at problems connected with internal issues: mainly internal communication, hierarchies and decision-making process. The sales persons seem to have problems in understanding how information they provide to the system is used by managers. Further studies about feedback between sales people and marketing people in the context of CRM systems usage seem to be reasonable. Not surprisingly, formal implementation of CRM system itself is not the panacea for company success in developing close and profitable customer relationships. It is rather a matter of organizational change which has to exceed departmental limitations and should be strongly supported by the top managers.

The authors of the paper are aware of limitations of the paper. These limitations are connected mostly with research method used by the authors and the restricted set of factors which were discussed. Authors argue that the explorative character of the study justified the qualitative/interpretative approach and the results from the one focus group may be treated as valuable insights for future quantitative studies and hypotheses testing.

There is no consensus with regard to the universality of previously suggested CRM or relationship marketing models (O'Malley & Tynan 2000; Pels 1999), because almost all of them were developed on the basis of studies conducted in countries with highly developed economies (e.g. USA or UK). Indeed, some initial studies about B2B relationships which were conducted in the context of post-communist Central and Eastern European Countries (Światowiec 2006; Mitrega & Katrichis 2010), suggest these countries may be treated as the specific context for implementation of CRM concept. Existing relationship-based marketing concept will probably benefit from incorporating more research insights from CEE countries.

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