

Customer Strategy: The Impact of CRM Implementation

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1. Introduction

In today's highly competitive logistics industry, strategically using advanced technology is crucial for maintaining performance and enhancing customer satisfaction, ensuring sustainable revenue growth. This report outlines the potential benefits and the implementation of a new Customer Relationship Management (CRM) system in Arkas Logistics(AL), along with the learning outcomes expected of this assessment.

2. Background

AL is a family-owned logistics company based in Turkey. I currently lead the company as a managing partner. It has 1700 employees, operates in 14 locations in Turkey, and generates a turnover of 300 million USD. It comprises four central business divisions: a forwarding division on sea and air accounting for half of the turnover; a domestic trucking division, a warehousing division; and an intermodal railway division. Our client base exceeds 100,000.

In 2018, we acknowledged the importance of customer strategy and used our operational IT software to segment (Reichheld, Schefter and Rigby, 2002) our most profitable and loyal customers. This allowed us to deliver personalised service and led to significant revenue growth.

3. Analysis and Learning Outcomes

3.1. Case For Change

A good understanding of the business, analytical skills for identifying and presenting data and trends, and communication skills to articulate the need for change and the consequences of inaction to highlight the urgency are used to build a case for change. Presently, the management of data across divisions using various operational IT systems has become intricate, posing numerous challenges :

-Poor team coordination leads to information loss and a negative customer experience (Salesforce.com, n.d.). For example, different departments may contact the same client multiple times in a day or repeatedly ask for the same information.

-As the number of clients increases, executive managers (EMs) cannot meet all of them in person. Adding to the problem of the above-mentioned information loss, we risk losing control of client relationships to sales representatives (SRs), who have a higher turnover rate(Andris A. Zoltners, 2011). EMs are becoming more dependent on SRs, losing their power to manage(Kotter, 1977).

- We are at significant risk of undervaluing our clients because we have difficulty extracting intelligence. Our ability to enhance customer value by acquiring new customers, increasing revenue from existing ones, retaining them, and improving the overall customer experience is limited (Markey, 2020).

- Our inefficiencies in marketing (Beaudin and Brinda, 2015) and in setting up marketing automation systems hinder innovation by making it challenging to identify client needs and disable the development of new service products (Yohn, 2019).

- New trends in CRM offer the possibility of pulling insights from vast amounts of customer data by combining AI, and we are missing out on these opportunities (Weinberg, 2024).

All these challenges highlight the need for further change: failure to innovate our technology will inevitably result in a loss of rapid economic growth.

3.2 Compelling Vision

Strategic thinking, visionary leadership, and problem-solving skills are used to create and communicate a clear vision for the future, inspiring and motivating a diverse group of individuals to develop actionable strategies.

We have established a vision with the "coalition" as described in the communication section below, and our agreed vision is: "Our goal is to dominate the Turkish logistics market and, by leveraging technology, establish our brand as a customer-focused and innovative business that effectively adapts to changing market conditions and customer demands, creating high customer value, ultimately increasing shareholder value and employee value proposition".

The leader's vision is essential. Tidd and Bessant (2013, p.114) point out that studies on the correlation between leadership and company performance indicate that leaders influence approximately 50% of a company's overall performance. Innovation is crucial in today's fast-paced world and requires change. Transformational leadership (TL) is found to have a more significant influence on innovation due to its inspirational communication traits, resulting in improved team and employee performance. Implementing CRM requires a cultural shift beyond current positions (Anthony and Schwartz, 2017) as it will change employees' perceptions of customer interaction, leading to a positive shift in power towards managers. CRM technology will provide the data, tools, and structure to help EMs achieve higher revenue growth

by reducing their dependency on the sales force(Kotter 1977) and optimising their influence on sales activities. The software will direct and apply new assumptions to establish new behaviours and shape culture with less conflict (Schein 2010,p.325).

3.3 How to communicate plan

Leadership, collaboration, influence and negotiation, problem-solving, empathy and communication skills are used to lead and inspire diverse groups, build effective teams, spread the vision, unite coalitions, persuade stakeholders, and develop comprehensive communication plans.

Change leadership and effective communication are prerequisites to success in managing change. However, when it comes to transformation and innovation, organisations need both change leadership and change management to do things differently and better (Todd and Bessant, 2013,p.111).

I am the change leader because, as a shareholder, I have the power to bring attention to blind spot issues that others cannot(Senge and Kleiner, 1999, pp.398) and the authority and power to allocate financial resources(Kotter, 1977), i.e., CRM consultancy, purchasing, and maintenance costs. The CEO is the change manager because he must design the tools and structures that help maintain control over change efforts(Kotter, 2014).

An analysis of stakeholders is necessary to form a robust communication plan (Errida and Lotfi, 2021) throughout the project. The CEO and I have a high agreement and trust level (CMT,n.d,p.13), and both want “head & heart”(Kotter, 2024) for the project to succeed. The C-level marketing, operations and technology managers are our allies, and we form a *strong coalition* (Kotter, 1995). Through this relational power (Wooll, 2021), we aim to influence opponents and neutrals to engage actively. The opponents are described in the “resistance” section; the middle managers and end users are neutral (CMT,n.d pp.13-14)and must be positively influenced since they are essential resources for change agents(Kotter,2022).

The project will be implemented in two phases without a pilot group. The kick-off meeting is the project's most critical communication(please refer to Appendix 1 for a detailed communication plan), and its audience is all stakeholders.

I plan to communicate the following:

- a. Emphasize the urgency and necessity of the change. Kotter (2024) states that change must be made if we want to preserve our value of "success" (CMT, n.d, p.27)
- b. Share the information that the CEO and I will undergo training to upskill, demonstrate commitment, and establish expert power (CCL, 2021) for later stages.
- c. Use hidden messages to address potential concerns of the sales team, such as offering assistance with data entry, as this change will affect their daily routines.
- d. Request non-managerial change agents (Kotter,2022) to volunteer. Influence can be created by using change agents: According to Cialdini (2021,p.121), the concept of social proof indicates that people are more likely to view an action as correct if they see others performing it. The commitment of these change agents will also lay the groundwork for broader agreements that will be necessary later in the project as people aim to align with their previous commitments(Cialdini,2021, p.303).

The meeting will be considered successful, and the climate for innovation will be set(Tidd and Bessant, 2013, pp. 111) if we influence and motivate enough stakeholders to leave the room thinking they *must* + *want* to make a change(kotter2022, n.d.).

3.4 How to manage barriers

Problem-solving, decision-making, and adaptability skills are used to identify obstacles hindering progress and make swift and effective decisions and plans to remove barriers and adapt to changing conditions.

The most critical barrier, with a very likely and high impact (CMT, n.d.), is the risk of migrating customer data (Edinger, 2019) (Gordon, 2023a). The data must be checked for mistakes and duplications, not just thrown into the new system. Having clean data in one source is crucial for extracting insights to improve sales performance and develop customer strategy (Nutshell, n.d.).

In the first phase, we will form a diverse team that includes users from the sales, marketing, financial, operational, IT units, and change agents to reduce the high risk. The data entry team will take orders from and support the central team. Change agents will be responsible for documenting past mistakes in data entry and their repercussions on the business. Educational sessions will be held with stakeholders we want to influence, especially sales teams. In the second phase, the continuity of detailed data

entry on customers, e.g. customer visit details, will need to be followed closely. For this, I will use positional power (CCL, 2021) and empower the operational audit team to check data quality daily. Also, monetary incentives for prioritising better-adapted units and users will help build new cultural practices(Schein p.247).

3.5 How to manage resistance

Addressing stakeholder concerns and encouraging active participation despite resistance requires resilience, cultural awareness, effective communication and empathy.

Resistance is due to distinct subcultures in divisions. The warehouse and trucking divisions value collaboration and transparency, supporting management's need for accurate information. In contrast, the sea-forwarding division values freedom and ambiguity, which leads to a different mindset in client interactions (Schein,2010,p.20,266). The basic underlying assumption(Schein,2010, pp. 27-28) is that they own the client relationships(Andris A.Zotners,2011). This mindset results in a lack of consideration toward management's data needs, creating resistance when shifts toward collaboration and transparency are required.

According to Schein (2010,p.313), any change in values inherently causes fear and anxiety, contributing to resistance. To facilitate the transition, communication during kick-off should ease fears, explaining that the CRM system aims to reinforce the company value of success, improve sales figures (Ledingham and Rigby,2004) and customer satisfaction and that it is not a tool of inspection (Edinger, 2019). Post-kick-off, a dedicated team empowered to take action (Senge and Kleiner, 1999, p.4), inclusive of sales representatives and change agents, fostering an environment that supports open discussion and one-on-one coaching will be formed. Active listening skills(Cherry, 2023) and a commitment to genuinely being responsive to others' needs and viewpoints, developing trust, and avoiding defensiveness in communication (Senge and Kleiner, 1999, pp.154-156,247) are crucial in creating engagement.

The Manager as a Leader assessment (MIT HR, n.d) has identified communication as my development area, and I agree with the results. According to Senge and Kleiner (1999, p. 209), reflection is considered one of the most essential concepts in learning. I intend to utilise Gibbs' reflective cycle (Main, 2023) to maintain a structured approach while keeping a reflective journal (Bailey and Rehman, 2022). This will assist me in

developing my communication skills to be more empathetic, maintain open and supportive relationships and effectively engage people in the project. Good communication will also help me anticipate potential limitations, thus minimising project risk.

3.6 How to show progress

Resilience and communication skills to maintain momentum and continuous improvement have been used.

According to Kotter (2024), generating and showing short-term wins is essential for leading change. Success metrics are important in this respect to keep the momentum going. Early progress metrics have been chosen to demonstrate progress in the early stages, aiming to motivate users. We will only focus on positive values and avoid instilling fear in our SRs. Skills to manage recognition and reward systems to maintain the current pace of progress are used.

- High usage rates of the CRM system by all intended users (Gordon, 2023b).
- Customer retention rate: The percentage of customers who remain customers over a given period(Ibid.)
- Lead-to-opportunity conversion rate: The percentage of leads that convert to sales opportunities(Ibid.)
- Win rate: The percentage of sales opportunities you successfully close(Ibid.)

3.7 How to reinforce change

Schein(2010,p.313) discusses how culture changes are transformative because they involve unlearning and relearning. The key to learning is to get feedback and take time to reflect, analyse, and assimilate the implications of what the feedback has communicated. Feedback will be received through monitoring success metrics and tools such as surveys, meetings, and open comment boxes. The steering committee will evaluate feedback, and depending on needs, 1:1 coaching sessions and continuous training (Gordon, 2023c) will be provided. Problem-solving and analytical skills will be used to identify and address obstacles, make swift and effective decisions, and adapt plans as needed. Resilience skills will be instrumental in maintaining focus in the face of unexpected challenges, e.g. changes in team members. I will then adapt,

set new goals, and strive for continuous improvement. Monetary incentives will be provided to users with high adoption rates, successful change agents, and those driving the team to support integrating new practices into the culture(Schein,2010,p.247).

Communication skills are essential in each step. According to Tidd and Bessant (2013,p.136), maintaining a collaborative and participative climate is crucial to keeping the momentum of the driving team while evaluating feedback.

Conclusion

Implementing our CRM project has transformed our organisation, fostering a more cohesive approach to customer management. The project has underscored the importance of communication and the value of integrated customer data, resulting in a better, more efficient customer strategy and sustainable growth. To sustain these gains, we must keep the communication active, focus on continuous CRM optimisation, adapt to changing client needs, and conduct periodic system evaluations to ensure alignment with business goals.

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Appendices

Appendix 1

Communication Plan

Communication Activity	Audience	Message/Content	Communication Channel	Frequency
Kickoff Meeting	All Stakeholders	Project overview, objectives, timelines, roles	In-person/Virtual Meeting	Once
Monthly Status Updates	All Stakeholders	Progress reports, upcoming milestones, issues/risks	Email Newsletter	Monthly
Training Sessions	End Users	How to use the new CRM system	Workshops/Webinars	As needed
FAQs and Resources	End Users	Frequently Asked Questions, user manuals, support info	Intranet/Company Portal	Ongoing
1:1 Coaching	Leader and CEO to change agents	Coaching	Face to Face	Ongoing
Feedback Surveys	End Users	Collect feedback on CRM usability and issues	Online Survey Forms	Bi-weekly for 2 Months post-implementation

Communication Activity	Audience	Message/Content	Communication Channel	Frequency
Executive Briefings	Executive Sponsor, Key Leaders	High-level updates, ROI projection, strategic alignment	Executive Meetings	Quarterly
Office Hours/Help Desk	End Users	One-on-one support and troubleshooting	Drop-in Sessions/Call Center	Weekly
Change Impact Assessment	All levels	Impact on roles, responsibilities, processes	Email/Workshops, Documents	Initial + Post-implementation

Appendix 2

Change Development Plan

Phase 1(1,5 years)	Risks//Risk plan	Phase 2(6 months)	Risks/Risk Plan
Choice of CRM software and consulting company and executive approvals	Changes in the team <u>are possible</u> , and <u>medium impact</u> , such as being unable to keep the deadlines. <i>Financial deterrents</i> have been included in the contract.	Switchboard system integration	<u>Unlikely Low Impact</u>
Design of project executive CRM team and field team and executive approvals	Inefficiencies created by unexpected life events are <u>possible</u> and would have a <u>medium impact</u> . A small <i>backup team</i> is formed.	Design and activation of Marketing system modules (e.g. campaigning)	<u>Possible medium impact</u> The CMO's(Yohn, 2019) role in cooperating with the sales teams is vital(Edinger, 2019). The executive team is organised to be closely involved.

<p>Design of software development needs</p>	<p><u>Possible risks</u> of not being user-friendly would have a <u>medium impact</u>. <i>Live feedback/help desk</i> channels have been established.</p>	<p>Design and activation of customer satisfaction modules</p>	<p><u>Possible medium impact</u> The executive team is organised to analyse customer feedback closely after team.</p>
<p>Migration of data</p>	<p><u>Very Likely, medium impact</u> <i>A diverse team</i> with users representing the sales and financial units is involved in the project, in addition to the data entry team.</p>	<p>Overall user engagement</p>	<p><u>Possible, high impact</u> Some users may need more support and motivation. -Ongoing support team -Periodic focus meetings of the project manager with key users and the support team with a close focus on problem areas and decisions depending on needs. -Monetary incentives to better-adapted units and users to build the new practices in the culture(Schein ,2010,p.247).</p>
<p>Design of authorisation matrix and approvals/Data safety</p>	<p>Very Unlikely/ high <u>impact</u> Following best practices on data safety and implementing user access controls (Gordon, 2023a)</p>	<p>Success Metrics (Gordon, 2023b)</p>	<p><u>Very Unlikely, high impact</u> Metrics have been designed from the beginning to avoid the risk of inability to track information for the following metrics (Gordon, 2023b)</p>
<p>Operational, financial SAP systems,</p>	<p><u>Unlikely/high impact</u>. One team member has been added to</p>	<p>Continuous entry of customer information</p>	<p>The operational audit team is randomly checking data monthly</p>

dashboard integration	the integration IT team for continuous information flow.		
Intensive training for users(Gordon, 2023c)	Low effectivity of training is <u>possible</u> with <u>high impact</u> Online assessments have been formed, and trainings are repeated as needed.	Intensive training for users	Low effectivity of training is <u>possible</u> with <u>high impact</u> Online assessments have been formed, and trainings are repeated as needed.
Going Live	<u>Unlikely/ high impact.</u> System tests are in place, lowering the possibility of failure to near zero. (Gordon, 2023a)		
		Sustaining Change	<u>Unlikely /high impact</u> Losing interest momentum Appointing of more change agents and monetary incentives for those who support

