

# CRM Best Practice: Getting it Right First Time at ESB International (ESBI)



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## ABSTRACT

This study investigates the implementation of a Customer Relationship Management (CRM) initiative within ESB International<sup>1</sup> (ESBI). During 2003, ESBI used the European Foundation for Quality Management (EFQM) Business Excellence framework<sup>2</sup> to identify key business areas for improvement. CRM was one such area. Initially ESBI reorganised its business structure around customer key accounts, effectively implementing a customer-centric business model prior to the implementation of the CRM initiative in 2004. Qualitative research was conducted with senior management via in-depth interviews. Research findings suggest that the key success factors for CRM implementation in ESBI include senior management commitment and leadership, clear strategic planning and a coordinated and targeted programme which successfully combines organisational and process changes with the application of new technology.

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## INTRODUCTION

Strategic, organisational and technological issues are all important in achieving CRM success (Roberts et al., 2005). Companies who have successfully implemented CRM initiatives develop a clear business case and implementation framework, with a targeted plan to make it happen (Almquist et al., 2002). Such companies adopt a pragmatic, disciplined approach to CRM implementation, launching highly focused projects that are relatively narrow in their scope and modest in their goals (Rigby and Ledingham, 2004). While both technology and business processes are critical to CRM implementation, successful firms view technology as a tool to help build profitable customer relationships while recognising that individual employees are the building blocks (Almquist et al., 2002; Chen and Popovich, 2003). Research supports the contention that CRM strategies that are clearly linked to business objectives have a much greater likelihood of success (Agrawal, 2004). Top management support and commitment is a key success factor for the implementation of CRM in organisations. Employee resistance is a risk associated with CRM implementation which can be overcome by involving end users in all stages of the CRM development process (Xu et al., 2002; Harding et al., 2004). The paper proceeds with a literature review, the qualitative research methodology is outlined and a case study of the central organisation ESBI is presented. A critique of CRM literature and the obstacles encountered in CRM implementation is beyond the scope of this particular paper which is focused on examining the criteria underpinning the successful implementation of CRM initiatives. These criteria are then analysed in the context of the ESBI case environment.

## LITERATURE REVIEW

CRM can be seen to be firmly rooted in relationship marketing which is aimed at improving long-run profitability by shifting from transaction-based marketing to customer retention through effective management of customer relationships (Christopher et al., 1991). The philosophical bases of CRM are relationship marketing, customer profitability, lifetime value, retention and satisfaction created through business process management (Chen and Popovich, 2003). Relationship marketing is concerned with how organisations manage and improve their relationships with customers for long-term

profitability. In turn CRM is concerned with using information technology (IT) in implementing relationship-marketing strategies (Ryals and Payne, 2001). This approach, coupled with CRM software, provides the functionality that enables a firm to make the customer the focal point of all organisational decisions (Nemati et al., 2003) with some practitioners suggesting that CRM can provide a platform for the operational manifestation of relationship marketing (Plakoyiannaki and Tzokas, 2002).

A difficulty with CRM is that it can mean different things to different people. Even the meaning of the abbreviation is contested (Buttle, 2004; Paas and Kuijlen, 2001). Most definitions however converge on two things: relationships and information technology. CRM technologies are best seen as enablers of the people and processes needed to effectively and efficiently manage customers, with CRM seeking to provide a strategic bridge between IT and marketing strategies aimed at building long-term relationships and profitability (Chen and Popovich, 2003; Roberts et al., 2005; Ryals and Payne, 2001). For this paper, CRM may be conceptualised as follows, 'CRM is the information technology face of the business processes that aims to establish enduring and mutually beneficial relationships with customers in order to drive customer retention, value and profitability up' (Agrawal, 2004: 151).

### **Goals of CRM**

CRM is all about organisational readiness in implementing customer-focused strategies, which in turn makes customer interactions mutually rewarding for both the firm and its customers (Hansotia, 2002). Pass and Kuijlen (2001) maintain that investments made by each party must be exceeded by the profit gained for it to be a meaningful long-term relationship with mutual loyalty. However, despite the popularity of CRM and its obvious benefits to companies, success in implementing CRM is proving elusive (Bull, 2003; Roberts et al., 2005).

### **Technology as an Enabler of CRM Success**

While technology is an enabler of CRM success, other marketing and organisational issues are key drivers of successful CRM implementation (Roberts et al., 2005). CRM technology is at its most

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valuable when it enables customer friendly business processes that actually drive the bottom line and when employees embrace it as a tool to improve customer relationships (Harding et al., 2004). A critical issue in evaluating and designing CRM business systems is the understanding that business needs should always take precedence over technological capabilities (Kotorov, 2003; Rigby and Ledingham, 2004). In the past, many companies experienced difficulties in implementing effective CRM programmes because they allowed software vendors to drive their CRM projects or, alternatively, they unsuccessfully tried to retrofit a customer strategy to match the CRM technology purchased (Rigby et al., 2002). In contrast, successful companies formed cross-functional teams to carry out identified organisational changes within each department or business unit prior to proceeding with their CRM implementation (Kotorov, 2003).

### **The Organisational Challenge of CRM**

A firm planning to implement CRM needs to redefine the existing functional silos within the organisation and create a structure that focuses on the entire scope and life cycle of customer relationships. Indeed, to successfully implement CRM the entire organisation may need to be realigned to focus on the customer (Roberts et al., 2005). While multi-channel management seems to be a hallmark of a successful CRM strategy, the challenge for the organisation is one of coordination, the absence of which can result in failure by delivering an incomplete and distorted view of the customer (Crosby and Johnson, 2002; Kotorov, 2003).

### **Adopting a Pragmatic Approach**

Starkey and Woodcock (2002) suggest that high CRM performers tend to already have a well-developed people and systems infrastructure and a mature customer-centric culture prior to implementing CRM in their organisations. Successful companies take process and system integration seriously and do not rush to produce customer level results without having first obtained a 360 degree view of the customer (Kotorov, 2003). Agrawal (2004) suggests that the companies who have successfully implemented CRM have largely adopted a pragmatic, disciplined approach to implementation, launching highly focused projects that are relatively narrow in their

scope and modest in their goals. Rather than using CRM to transform entire businesses, they direct their efforts towards solving clearly defined problems within their customer relationship cycle (Rigby and Ledingham, 2004).

### **Management Support and Leadership**

Without top management support and commitment, even the most brilliant CRM deployment and implementation initiatives are doomed to fail (Kale, 2004). When implementing CRM, companies need to introduce an enterprise-wide programme of change management to facilitate the transformation of the organisational culture into a customer-centric one (Roberts et al., 2005; Xu et al., 2002). Indeed, Rigby et al. (2002) warn that the lack of adequate change management can often lead to CRM failure. CRM success largely depends on the leadership team taking ownership of the strategy and ensuring that the organisation has the knowledge, skills, resources, measures and tools, management processes and systems to make customer relationships a reality (Crosby, 2002).

### **Employee Buy-In and Training**

While both technology and business processes are critical to successful CRM implementation, even the best CRM strategies and applications stand little chance of succeeding without employee buy-in (Agrawal, 2004; Xu et al., 2002). Having business users drive process design makes it more likely that they will create solutions that are practical and will not be rejected (Harding et al., 2004). Efforts to ensure employee alignment with CRM strategy should also include a well-planned training programme incorporating skills development and tools to gather and address feedback and ongoing communication strategies (Agrawal, 2004; Xu et al., 2002). A CRM roll-out will succeed only after the organisation and its processes, job descriptions, performance measures, compensation systems and training programmes have been restructured in order to better meet customer needs (Rigby et al., 2002).

## **RESEARCH METHODOLOGY**

The objective of this research was to investigate the implementation of a CRM initiative within ESBI. The objective required the researchers

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to gain an in-depth understanding of the CRM business philosophy and the processes used to ensure its successful implementation. The case study methodology was chosen to provide an understanding of the dynamics present within single, real-life settings (Yin, 1994). This approach is becoming increasingly widespread within management research and is appropriate to the focus on a select number of issues fundamental to an enhanced understanding of CRM implementations. Case study research is also particularly useful when directed at managers who must implement the findings (Curry and Kkolou, 2004) and is often the method of choice when the subject under consideration is a project or programme in an evaluation study (Yin, 2003). Within an ongoing research project this single case study is being conducted as a prelude to further study of CRM implementations.

The research proceeded in three phases. Kaplan and Duchon (1988) argue that collecting different kinds of data by different methods from different sources provides a wider range of coverage resulting in a fuller picture. Firstly, a documentary analysis using offline and online sources was conducted on ESBI. Secondly an analysis of internal operational documentation was carried out. Finally in-depth interviews, considered by some as being one of the best methods of data collection (Easterby-Smith et al., 1991; Yeung, 1995), were conducted with senior management directly responsible for the CRM implementation process within ESBI. Two formal two and a half hour interviews were conducted.

Explanatory studies are typically suitable for an interview approach (Saunders et al., 2000) as interviews allow the researcher to discover the reasoning behind decisions made by the respondent and to appreciate the opinions and beliefs of the respondent (Yeung, 1995; Saunders et al., 2000). In-depth interviews also permit researchers to deal with a large range of issues in an open-ended fashion and permit probing and examination until both researcher and respondent have reached a mutual understanding (Gilmore and Coviello, 1999). A team approach to interviewing was taken (Eisenhardt and Bourgeois, 1988) which improves the reliability of the study and builds confidence in the findings (Eisenhardt, 1989). The use of multiple sources of evidence – triangulation – enhances the reliability of findings and leads to a greater degree of belief in the accuracy of the findings (Yin, 1994).

### **Research Limitations**

The research methodology acknowledges the limitations inherent within qualitative research, such as arguments against validity and generalisation of findings. Validity concerns the integrity or credibility of results derived from qualitative research (Saunders et al., 2000; Bryman, 2001). However carefully conducted interviews can yield high levels of validity. The case discussion is limited to factors underpinning successful CRM implementation given the recency of CRM deployment within the organisation. The current study was conducted as a single case limiting the results to a specific organisational context; however the findings provide guidelines both for the next stage of the multiple case research design and also for other organisations in the initial stages of implementing CRM.

### **ESB INTERNATIONAL (ESBI) CASE BACKGROUND**

ESBI is an engineering consultancy, contracting and investment company operating in the fields of generation, transmission and distribution of electricity, control and communications systems, utility operations, civil, structural and environmental engineering. As one of the world's leading multi-disciplinary engineering firms in the power and energy sector, ESBI has a compliment of over 1,500 staff. While half are permanently located in Ireland, the remainder are located in representative offices overseas: London, Bilbao, Glasgow, Bahrain, Abu Dhabi, Belgium, Vietnam and Malaysia. ESBI works in close partnership with its customers and has completed projects in over 115 countries to date. ESBI is a wholly owned subsidiary of the Electricity Supply Board (ESB), Ireland's national electricity utility. The ability of ESB International to deliver total solutions, coupled with a commitment to complete projects on time and within budget, has earned the company a strong reputation with national/municipal utilities, IPP (Independent Power Producer) investors and funding agencies worldwide.

### **Pursuing Business Excellence**

In early 2003, ESBI Engineering and Facility Management (ESBIEFM), the engineering, consultancy and facility management arm of ESBI, identified a critical need to move its focus from an emphasis on outcomes defined exclusively by financial results to

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driving continuous organisational improvement. As a result, ESBIEFM defined and began to implement a new ESBIEFM Business Model in July 2003. The business model is founded on the twin platforms of ISO 9001:2000 and the European Foundation for Quality Management (EFQM) Business Excellence Framework. The use of both platforms provided the quality framework which is facilitating the company in developing a customer-focused, process-driven description of the policies, objectives and operations of ESBIEFM. This approach enabled the company to move from purely compliance-based systems to ones that allow for continual improvement and at the same time can be seen to add real value in the workplace to all staff. The EFQM Business Excellence Framework allowed ESBIEFM to assess how well it was managing all key areas of the business and the quality of the results achieved. A self-assessment including a representative sample of staff identified eleven Areas for Improvement (AFI's) within the organisation. One of the AFIs prioritised by ESBIEFM was Customer Relationship Management (CRM) and Key Account Management (KAM).

### **Customer Relationship Management at ESBIEFM**

Having identified Customer Relationship Management (CRM) as a priority, ESBIEFM set about implementing new management processes. In order to ensure buy-in from all stakeholders, ESBIEFM decided to define the current and future vision of CRM within the organisation and from there to determine whether ESBIEFM required a software package or a bespoke CRM application. A detailed CRM project implementation programme was developed based on an internal survey to profile ESBIEFM's customers, user requirements, the organisation and its relationships. This provided the basis for an internal workshop, facilitated by management and ESBI's project consultancy partner Ventis, which focused on defining ESBIEFM's vision of CRM. The outcome of the workshop provided ESBIEFM with a company-specific view of CRM in terms of its business applications, activities and integration requirements as well as internal organisation and business intelligence. ESBIEFM recognised that it required a better understanding of customers and their expectations in order to focus the organisation's resources where they are most required. The business requirement for readily available and



accessible real-time accurate information was identified. Having established its CRM vision, ESBIEFM defined its CRM needs as the development of a systematic approach to the management of its customers, aligned to objective metrics to monitor client satisfaction. This in turn would allow the company to deliver and exceed specified levels of service provision and build and maintain client relationships such that ESBIEFM would be regarded as an integral member of the client's team.

### **Selecting the Vendor**

As existing ESBIEFM systems and applications did not meet all these requirements, specific CRM terms of reference were developed. Following detailed and comprehensive consultations with staff, ESBIEFM and its consultancy partner Ventis mapped out each customer process and developed detailed functional specifications for potential CRM vendors, prior to issuing a competitive tender. All companies who submitted tenders, from the market leaders to the smaller companies who were concentrated in a number of areas such as sales force automation, were invited to present their CRM functionality and outline how they met the CRM specifications of the client. ESBIEFM recognised that the software package 'AccPac CRM' would assist them in embedding aspects of best marketing practice as well as reducing development costs.

### **CRM Roll-Out**

Following an initial six-week pilot, the CRM application was incrementally rolled out across the organisation on a phased basis. After eighteen months in operation, the system supported fifty users throughout the organisation, including engineering staff, the Executive Director, Project Manager, Company Secretary and administration staff. Access is allocated on a business priority basis with system users granted different levels of access depending on seniority and levels of responsibility, thus addressing issues relating to the confidentiality and sensitivity of certain business and customer information. Customer profiles have been developed and updated within the CRM system and the company has been able to drill down into workflow processes in terms of managing projects from the first initial enquiry or contact through to developing the

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business proposal, winning the business, and through to signing the contract, follow-up and prospecting for repeat business. Approximately 500 customer profiles are currently on the CRM system which enables all customer issues to be tracked and monitored in order to determine and improve resolution time-frames with the aim of further improving customer service.

### DISCUSSION

CRM is not right for every company and it is advisable for the corporate sector to begin by clearly defining its business issues and needs and then determining whether CRM can and should be part of the solution (Agrawal, 2004). In adopting CRM technology, ESBIEFM did not seek to fundamentally change its interaction with customers but rather it sought to build value from those interactions and ensure the information was not lost to the organisation. ESBIEFM, in line with the recommendations of Almquist et al. (2002), built a strong business case for CRM showing how the new technology would support their business design and estimating the value of the expected benefits. By leveraging a model of best practice embedded in an off-the-shelf system, ESBIEFM reduced the risks and costs involved in the development of its own bespoke software (Wilson et al., 2002). By identifying the process changes and improvements that were required to deliver customer excellence, ESBIEFM developed a clear vision of what CRM would be and how it would fit with and improve these customer and business processes. As suggested by Kotorov (2003), this approach has merit as business needs should determine the functionality to be deployed and not vice versa.

### **Organisational Challenges**

Most organisations need to reorient aspects of their operations to make them customer-centric and seamlessly effective from end-to-end (Roberts et al., 2005). Prior to implementing CRM in the organisation, ESBIEFM recognised the need to re-engineer its business processes and its business structure to provide a clear emphasis on engineering and customer excellence. ESBIEFM acknowledged the need to move away from its old structure which was organised around technical disciplines and engineering 'silos'. The new and current

ESBIEFM organisational structure focuses the organisation on the customer key accounts that make the most valuable contribution to ESBIEFM's business and meeting their needs. Though CRM does involve customer interactions it is much more about organisational readiness in implementing customer-focused strategies (Hansotia, 2002) and ESBIEFM's new structure facilitates this.

### **Quality Management**

Li et al. (2002) propose that in organisations where Quality Management (QM) is implemented and given top priority, there should be impacts that resonate throughout the organisation. They maintain that the concern for quality should extend to CRM initiatives and propose a strong positive relationship between the quality and extent of the CRM initiatives and the corporate QM strategy. This is reflected in the approach and operation of ESBIEFM. The use of the EFQM Business Excellence Framework provided a foundation for a complete review of business processes within the company and facilitated ESBIEFM in making the strategic shift from purely compliance-based engineering systems to developing a customer-focused, process-driven description of the policies, objectives and operations of the company. This dedication to improvement has permeated the organisation and followed through to the approach adopted for the implementation of CRM.

### **Implementing CRM**

Managers often seek dramatic changes as opposed to incremental change managed over time (Starkey and Woodcock, 2002). This was not the case within ESBIEFM where the CRM Project Manager decided early on in the process that the company was not going for a 'big bang out-of-the-box' approach to the project's implementation. Successful implementers of CRM continuously plan to consolidate improvements and create short-term wins. An incremental and phased approach to CRM implementation, like that of ESBIEFM, contributes to the successful roll-out throughout the organisation and can help to build credibility for those driving the change through the visibility of early deliverables. The alternative big bang approach is more vulnerable to cancellation due to a perceived lack of progress by employees and management (Roberts et al., 2005; Wilson et al., 2002).

**Top Management Support and Employee Buy-In**

Implementing a CRM system is a complex undertaking, requiring buy-in and effort across the organisation (Roberts et al., 2005). As with other IT applications, top management sponsorship and the presence of a champion to drive the intervention are widely recognised as important factors for successful CRM implementation (Wilson et al., 2002). A senior manager sponsored the CRM project, assisted by another manager overseeing the tactical implementation of the project. Employees using CRM address any queries to the CRM project team.

**End User Participation and Training**

End user participation is considered a critical success factor in CRM adoption, increasing levels of user satisfaction and enhancing perceptions of the usefulness of CRM processes and applications (Avlonitis and Panagopoulos, 2005). Managing employee resistance in organisations such as ESBIEFM, which are characterised by very personal and highly profitable relationships between end users and their customers, is particularly critical to successful CRM implementation (Landry et al., 2005). Neville and Mohally (2004) suggest involving end users from the start of the CRM project, communicating consistently – at the beginning to build confidence – and throughout the project to communicate progress and get feedback, as has been the case within ESBIEFM. Employees were regularly briefed on the CRM project and numerous workshops were also conducted with all customer-facing employees at an engineering level, at a business development level and at management level. In addition to end user participation and accurate expectation setting, organisational training is a pivotal factor in the user acceptance of CRM and is positively related to user attitudes towards the system (Avlonitis and Panagopoulos, 2005).

**CRM DELIVERING BENEFITS TO ESBIEFM**

CRM solutions not only improve customer loyalty but also internal processes, which in turn increase efficiency (Xu et al., 2002). CRM has delivered knowledge management and quality improvements in ESBIEFM, offering the company the possibility to achieve a seamless 360 degree view of its customers and market, covering the

entire business cycle (Xu et al., 2002). One of the key process improvements is the increased efficiency of priority business areas: the bid management and approval process. The streamlining of these processes and the improved accuracy and timeliness of the information has assisted staff in promptly responding to detailed customer queries and has enabled management to assess the company's liabilities and commitments on a real-time basis.

The roll-out of CRM throughout ESBIEFM will continue on a phased basis in consultation with staff and additional workshops are planned to determine each phase of the project. The main priority for future CRM developments is the integration of financial information with the system. ESBIEFM is also currently developing and revising metrics for all areas of the business. Metrics emerging from the CRM system focus on issues such as success rates in winning business and measuring repeat business with customers. The company has also embarked on an engineering excellence pathway where the company will be examined and scored on financial and customer performance measures extracted from the CRM system.

### CONCLUSION

This research illustrates how an international engineering consultancy has dealt with the initial stages of a CRM implementation project. Despite the limitations of a single case design it does offer tentative guidelines for managing CRM initiatives across a range of organisations. A key issue is that firms should have realistic expectations of CRM and its implementation and also exhibit a healthy scepticism towards some of the claims made on behalf of CRM technologies (Rigby and Ledingham, 2004). Companies need to adopt a strategic approach to CRM and define a strategy that fits their specific business case and organisational needs. Before embarking on an implementation programme firms need to develop a clear business case specifying what to do, how to implement the initiative, when it is appropriate and the resources, both financial and personnel, allocated to CRM activities (Almquist et al., 2002). CRM initiatives must also be assessed with the same financial criteria as any other major organisational investment.

Companies need to adopt a pragmatic, disciplined approach to CRM. Highly focused projects are more easily managed and

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monitored. Rather than using CRM to transform entire businesses companies may be wiser to direct their investments towards solving clearly defined problems within their customer relationship cycle (Rigby and Ledingham, 2004). Firms must remain clearly focused on growing customer value and on building customer relationships that enhance the long-term flow of profits to the company. If the scope of the CRM project is clearly defined (Kotorov, 2003) it helps to pave the way for the tactical implementation of CRM projects.

CRM technology should be viewed as a tool to help build profitable relationships and business needs should determine what functionality should be developed and deployed, not vice versa (Kotorov, 2003). Business needs should always take precedence over technological capabilities (Rigby and Ledingham, 2004) and careful selection of consultants and vendors is a crucial step in the process. Employee buy-in is also a key success factor for CRM implementation. Leveraging employee input in CRM strategy development and application selection at the front end will lead to greater buy-in post-implementation, as employees are experts in the types of information needed to enhance performance of their own roles (Agrawal, 2004; Landry et al., 2005). When designing or implementing CRM initiatives companies should heavily involve end users at all stages as this is the best way to ultimately ensure adoption.

Successful introduction of CRM in an organisation appears to be greatly facilitated by senior management commitment and leadership, clear strategic planning and a coordinated and targeted programme which successfully combines organisational and process changes with the application of new technology (Rigby and Ledingham, 2004). Firms also need to adopt a long-term perspective to develop and implement a strategically embedded CRM approach. A long-term commitment to organisational alignment and continuous process improvement are key prerequisites for achieving successful CRM deployment which delivers satisfactory returns on investment (Roberts et al., 2005).

### **Future Research Directions**

Within the context of ESIEFQM this single case is a prelude to further organisational research. The case study approach will be used to follow the CRM initiative as it unfolds. The next stage of the

research will also focus on the perspectives of customers, employees, consultants and management towards the CRM implementation programme. Outside of the featured organisation, other case studies are on-going within the engineering and public sectors. Future cases examining the CRM implementation process are planned within both product and service firms, and firms operating within both the business-to-consumer (B2C) and business-to-business (B2B) domain. The common denominator for case selection and screening is that companies are at the early stages of CRM implementations where the process can be examined as it unfolds within an organisational context rather than being examined retrospectively, post-implementation.

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- 1 ESBI ([www.esbi.ie](http://www.esbi.ie)) is a wholly owned subsidiary of the Electricity Supply Board (ESB) ([www.esb.ie](http://www.esb.ie)).
  - 2 European Foundation for Quality Management ([www.efqm.org](http://www.efqm.org)).

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