Developing an Integrated Model to Support Effective Customer Relationships Management Implementation within the Private Sector of the Kingdom of Saudi Arabia

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Abstract

A successful Customer Relationships Management (CRM) implementation helps organisations to obtain competitive advantages over others by improving customer satisfaction and loyalty, increasing revenue and reducing operating costs. Effective CRM implementation has become more and more important owing to the huge percentage of failures that occur. This year, organisations are expected to spend about $13 billion on implementing CRM. While a significant amount of research has been conducted into CRM implementations, particularly with respect to Critical Success Factors (CSFs), only a minority of the implementations have been successful. Culture plays a major role in CRM implementation. It is ranked one of the top three factors involved in CRM’s CSFs. Culture, therefore, become significant issues when planning to implement CRM within the developing countries, such as the Kingdom of Saudi Arabia (KSA) due to its existing cultural differences. Very limited research into CSFs for CRM implementation in the KSA exists. This research, therefore, focuses on identifying the CSFs and their interrelationships for CRM implementation in the KSA with the ultimate aim of developing an integrated model that includes these factors and their interrelationships to support effective implementation of CRM solutions within the private sector of the KSA from both organisations’ and customers’ perspectives. It adopts an integrated mix of case study and Grounded Theory as a research strategy. Data was collected through semi-structured interviews and documentation, which was then analysed using Grounded Theory data analysis. The findings showed that adoption of CRM in the KSA revealed some additional CSFs to those found within other studies, such as customer culture and the country’s policies and procedures. The interrelationships between the CSFs of CRM were identified and shown to be vital for
Successful CRM implementation. The results identified the relationships between CRM’s CSFs and their key development stages.

The findings were interpreted by using Institutional Theory. It was found that implementing a CRM solution as a response to institutional isomorphism pressures could lead to a conflict and mismatch of institutional logics among customers and CRM solutions. Organisations subjected to these pressures implemented CRM without the advantage of a cost-benefit analysis. This increased the failure of CRM adoption.

This research makes six major contributions. Firstly, a theoretical contribution was made by applying Institutional Theory to enrich the understanding and interpretation of the research’s findings. This provided useful insight into the main factors that affect the adoption of CRM and extended the line of research on the use of this theory to study Information Systems (IS) in organisations. Secondly, the development of the research model presented the CSFs that affected the adoption of CRM solutions and their interrelationships from both the organisations and customers’ perspectives within KSA. Thirdly, the research identified thirty-one cause-and-effect relationships between CSFs that need to occur in a dependency mode for the success of CRM implementation. Fourthly, it identified that each CSF needs to be executed in certain stages during the CRM’s development life cycle. Fifthly, this research provides organisations within the private sector in the KSA (those that intend to implement CRM solutions) with an extensive way of thinking about its CRM implementation. Finally, this research is one part of the very limited research focusing on the implementation of CRM solutions within the private sector in the KSA.
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Ahmed Sanad
Leicester 2012
Dedication

This work is dedicated to the memory of my parents, Abdullah and Shama, who encouraged and supported me throughout their lives. Their encouragement, words and enduring love, particularly those of my mother who passed away during my research, provided the real motivation for completing my thesis.

The work is also dedicated to my loyal wife Asam Binsanad. She remained a constant source of encouragement and support throughout my studies and devoted much of her time to our lovely daughter Roba and sons Abdullah, Abdulmajed, Omer and Abdulrahman when I could not. Thank you very much for that.

In addition, my thanks are extended to my brothers, sisters and friends for their support and kind enquiries about me.
Publications

I declare that, to the best of my knowledge, no portion of the work referred to in this thesis has been submitted in support of an application for another degree, or qualification, to any other university, or institute of learning. Some of the material contained here has been presented in the form of the following: (cf. Appendix A)

Journal Papers:


Professional Conference Papers (Published):


Professional Conference Papers (Under Review):

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<th>Description</th>
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<tbody>
<tr>
<td>AVR</td>
<td>Automated Voice Response</td>
</tr>
<tr>
<td>BPR</td>
<td>Business Process Reengineering</td>
</tr>
<tr>
<td>CEOs</td>
<td>Chief Executive Officers</td>
</tr>
<tr>
<td>CIOs</td>
<td>Chief Information Officers</td>
</tr>
<tr>
<td>COTS</td>
<td>Commercial Off The Shelf</td>
</tr>
<tr>
<td>CRM</td>
<td>Customer Relationships Management</td>
</tr>
<tr>
<td>CSFs</td>
<td>Critical Success Factors</td>
</tr>
<tr>
<td>EB</td>
<td>Electronic Business</td>
</tr>
<tr>
<td>eCRM</td>
<td>Electronic CRM</td>
</tr>
<tr>
<td>ERP</td>
<td>Enterprise Resource Planning</td>
</tr>
<tr>
<td>FHREC</td>
<td>Faculty Human Research Ethics Committee</td>
</tr>
<tr>
<td>GISs</td>
<td>Geographic Information Systems</td>
</tr>
<tr>
<td>GOSI</td>
<td>General Organization for Social Insurance</td>
</tr>
<tr>
<td>GNI</td>
<td>Gross National Income</td>
</tr>
<tr>
<td>IS</td>
<td>Information Systems</td>
</tr>
<tr>
<td>IT</td>
<td>Information Technology</td>
</tr>
<tr>
<td>KDS</td>
<td>Key Development Stages</td>
</tr>
<tr>
<td>KM</td>
<td>Knowledge Management</td>
</tr>
<tr>
<td>KSA</td>
<td>Kingdom of Saudi Arabia</td>
</tr>
<tr>
<td>MEA</td>
<td>Middle East and Africa</td>
</tr>
<tr>
<td>NOO</td>
<td>Nation Online Organisation</td>
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<tr>
<td>RM</td>
<td>Relationship Marketing</td>
</tr>
<tr>
<td>SAMA</td>
<td>Saudi Arabia Monetary Agency</td>
</tr>
<tr>
<td>SAPTCO</td>
<td>Saudi Arabia Public Transport Company</td>
</tr>
<tr>
<td>STC</td>
<td>Saudi Telecom Company</td>
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<td>UK</td>
<td>United Kingdom</td>
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Chapter One: Introduction

1.1 Introduction

The growing forces of increasing global competition, continuing customer demands and the significant revolution in Commercial Off The Shelf (COTS) solutions, especially Customer Relationships Management (CRM) applications, have put pressure upon many organisations to implement CRM solutions and to switch their organisation process from being product-centric to being customer-centric (Bose, 2002; Al-Ajlan and Zairi, 2005; Roha et al., 2005; Kim and Pan, 2006; Zgenera and I’razb, 2006; Forrester, 2007; Nguyen et al., 2007; Foss et al., 2008). Gartner (2003, p. 3) defines CRM as:

“A business strategy, the outcomes of which optimise profitability, revenue and customer satisfaction by organising around customer segments, fostering customer-satisfying behaviours and implementing customer-centric processes. CRM technologies should enable greater customer insight, increased customer access, more-effective customer interactions and integration throughout all customer channels and back-office business functions.”

From this definition, it can be seen that a CRM initiative is not only technology; it is a business strategy supported by technology which automates and enhances the processes associated with managing customer relationships (Chen and Popovich, 2003; Zablah et al., 2004; Seeman and O’ Hara, 2006; Amiri et al., 2010). Worldwide revenues for CRM solutions reached $12 billion in 2011 and they are expected to grow to more than $ 13 billion to the end of 2012, signifying the substantial growth in demand for CRM solutions (Gartner, 2011). According to a survey about technology priorities, performed
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by the Gartner Group (2012) for 2,335 Chief Information Officers (CIOs) participants, CRM was ranked eighth in 2012 compared to eighteenth in 2011. Another survey conducted in 2012 by Gartner (2012) for Chief Executive Officers (CEOs) revealed that CEOs quoted CRM as their most significant area of investment to improve their businesses over the next five years. Despite this finding, however, studies have found that 70% of CRM projects have failed (Giga, 2001; Corner and Hinton, 2002; Adebanjo, 2003; Chen and Popovich, 2003; Bull, 2003; Zablah et al., 2004; Al-Ajlan and Zairi, 2005; Chan, 2005; Heinrich, 2005; Missi et al., 2005; Gartner, 2006; Gefen and Ridings, 2007; Osarenkhoe and Bennani, 2007; Shum et al., 2008; Sanad et al., 2010). This means that only a minority of CRM projects have proven successful (Giga, 2001; Bull, 2003; Mendoza et al., 2007). Gartner (2006) argued that a high number of CRM projects are expected to continue to fail in the marketplace. Research indicates that there are many strategic and tactical Critical Success Factors (CSFs) for CRM implementation (Bose, 2002; Al-Ajlan and Zairi, 2005; Gartner, 2006; Forrester, 2007; Nguyen et al., 2007; Foss et al., 2008; Sanad et al., 2010). Several researchers have discussed best practice for implementing CRM solutions or have studied key components for successful CRM implementation (Bose, 2002; Gartner, 2006; Forrester, 2007; Nguyen et al., 2007; Foss et al., 2008). Alternatively, other researchers have investigated CRM implementation risks (Corner and Hinton, 2002). Research has identified that culture affects CRM implementation (CapGemini, 2002; Iriana and Buttle, 2006; Gartner, 2007). For instance, in a study performed by Gartner (2007) the top three CSFs for CRM implementation were found to relate to organisational culture (e.g. developing internal staff, change management, and organisational collaboration).
From these studies, the researcher can conclude that without an appropriate cultural foundation, CRM is less able to succeed. It is, therefore, important for researchers to examine CRM implementation issues in a specific country and/or cultural setting. Research investigating the effect of CSFs on CRM implementation in the Kingdom of Saudi Arabia (KSA) is minimal, and there is an absent model for KSA that includes CSFs and their interrelationships with respect to CRM implementation. This research, therefore, focuses on identifying the CSFs and their interrelationships for CRM implementation in the KSA with the ultimate aim of developing an integrated model that includes these factors and their interrelationships to support effective implementation of CRM solutions within the private sector of the KSA.

1.2 Research Motivations

The motivations of the research can be summarised as follows.

1. As aforementioned in Section 1.1 independent consultants, such as Gartner, have performed many surveys thereby amassing a large amount of information. These surveys revealed the importance of CRM solutions for organisations worldwide and the huge amount of money spent upon implementing them in 2012 with the expectation for this sum to grow significantly in 2013 and to continue to grow.

2. Many researchers have investigated CRM implementation; particularly the CSFs (cf. Section 1.1). Nevertheless, only a minority of the implementations have achieved success (as stated by many researchers in Section 1.1).

3. All the research literature showed that CSFs of CRM implementation have been investigated from the perspective of the organisation: none of them included customers’ perspectives as part of their investigation.
4. None of the research comprehensively identified interrelationships between the CSFs for CRM implementation.

5. None of the research comprehensively discussed the relationships between the CSFs and the key development stages for CRM implementation.

6. Culture plays a major role in CRM implementation (it has been ranked in the top three factors for CRM’s CSFs cf. Section 1.1 and 2.8). This means that CRM implementation will be particularly problematic within developing countries due to culture differences, such as in the KSA (cf. Section 2.9.3). There are very limited research into CSFs for CRM implementation in the KSA exists.

This research, therefore, focuses on identifying the CSFs and their interrelationships with respect to CRM implementation in the KSA, with the ultimate aim of developing an integrated model that includes CRM’s CSFs and their interrelationships to support effective implementation of CRM solutions within the private sector of the KSA.

1.3 Research Aim and Questions

This research aims to develop an integrated model that includes CRM’s CSFs and their interrelationships to support effective implementation of CRM projects within the private sector of the KSA. This can be achieved by answering the main research question:

What are the CSFs and their interrelationships that affect CRM implementation within the private sector of the KSA?

This main research question can be usefully divided into three sub-questions.
Chapter One

1) What are the CSFs and their interrelationships for CRM implementations that have already been identified in either developed or developing countries?

2) What CSFs emerge from existing CRM implementations in the KSA and why are they different (if they are) from those within developed countries? Does the culture have an impact?

3) What are the key development stages of CRM implementation and how do the CSFs identified in the KSA relate to these stages?

1.4 Research Benefits

This research will benefit both academics and practitioners.

From an academic’s perspective, this research extends the body of academic and theoretical knowledge. It offers a unique integrated model composed of CRM’s CSFs and their interrelationships from both organisational and customer perspectives to support effective CRM implementation within the private sector of the KSA, and provides a foundation for potential further study of successful CRM implementations within Arabic countries.

From the practitioner’s perspective, it will be of great benefit to organisations that are implementing or planning to implement CRM projects within the private sector of the KSA as they can use this model as a basis for supporting successful implementation. It will help practitioners to better understand CRM implementation from an integrated point of view (organisational and customer) and reduce the potential for failure of CRM project implementation by following the relevant, associated recommendations.
1.5 Organisations of the Thesis

In order to achieve the research aim and question stated in Section 1.3 the thesis is structured to compose eight chapters. The first chapter provides an introduction to this research. Chapters two and three focus upon the literature review. Chapter four addresses and describes the research methodology. Chapters five and six present details of the data collection and analysis respectively. Chapter seven presents a research discussion to answer the research question and sub-questions. Finally, chapter eight draws the recommendations and conclusions. The following paragraphs outline the content of each chapter, which is summarised in Figure 1.1.

**Chapter One:** This chapter contains an introduction to this research, research motivation, aims, questions, benefits and the organisation of the thesis.

**Chapter Two:** This chapter contains the first part of the literature review. It provides a general overview of the CRM concept. It focuses specifically on definitions of CRM, benefits of CRM, CRM history, drivers, categories and key components and CRM and culture. It also focuses on presenting the KSA context and discusses various issues, particularly KSA characteristics, such as its political system and culture. Finally, it offers analysis of previous research on CRM implementation within the KSA.

**Chapter Three:** This chapter contains the second part of the literature review. It covers the previous research into CSFs for CRM implementation. It explains the CSF concept. It provides an investigation and analyses of the previous research on CSFs for CRM and proposes a possible taxonomy of them.
Chapter Four: The aim of this chapter is to describe the research methodology adopted by this research. Firstly, the chapter introduces the principal research paradigms: positivist, interpretive and critical. Then it explains several research strategies, data collection methods and analysis methods for this research. During this chapter, the researcher justifies the selection of the appropriate research philosophy, strategy and method for this research. The chapter provides a detailed explanation for the selected data collection and analysis method. It explains the research design for integrating the case study strategy with Grounded Theory. Finally, it offers a set of criteria for evaluating the quality of the research.

Chapter Five: The aim of this chapter is to set out the context in which the data was collected. It justifies and describes the procedures that were followed in order to collect the data in the field, the selection of the case studies and their backgrounds, the ethical issues of the fieldwork and the case study protocol. Lastly, it describes the actual fieldwork that took place, including the pilot study.

Chapter Six: This chapter discusses the findings from the fieldwork conducted within the five organisations operating within the private sector in the KSA. It presents an analysis of the data that was collected from both organisations’ and customers’ perspectives. It provides an explanation of the findings using Grounded Theory procedures to analyse the data. It presents the relationships between categories and the core category. It shows the relationships between CRM’s CSFs. Finally, it identifies the relationship between CSFs and the CRM’s development stages.
Chapter Seven: This chapter presents a critical discussion of the research’s findings and outcomes of the data presented in Chapter Six by comparing them with those reported in the academic literature with the emphasis on answering the research questions. It proposes and utilises Institutional Theory to seek a greater theoretical explanation and deeper understanding for the findings. The chapter also provides an integrated model to support effective CRM implementation.

Chapter Eight: This chapter presents the conclusions and recommendations of the research. It identifies its main contributions, limitations and suggests directions for further research. The chapter also evaluates the quality of the research process as well as providing a summary of the whole research.

Figure 1-1: Thesis Structure
Chapter Two: Literature Review on CRM

2.1 Introduction

This chapter contains the first part of the literature review. It provides an overview of the CRM concept. It focuses specifically on definitions of CRM, its benefits, history, drivers, categories and key components, CRM and culture. It also focuses on presenting the KSA context and discussing various issues, particularly KSA characteristics, such as its political system and culture. Finally, it offers analysis of previous research on CRM implementation within the KSA. This chapter forms the foundation for the second part of the literature review, which is described in the following chapter.

2.2 CRM Definitions

A review of the current literature reveals numerous definitions for CRM. These range from the very narrow to the very broad and this due to the wide array of interests, perspectives, purposes and issues of importance germane to different authors (Winer, 2001; Yim et al., 2004; Zablah et al., 2004; Xu and Walton, 2005; Valsecchi et al., 2007). Although the importance of CRM for organisations, there is no constant definition for the term (Light, 2003; Ko et al., 2008). When CRM is mentioned, most people think of technologies that could enhance sales and order management, marketing and field services (Winer, 2001; Valsecchi et al., 2007). CRM, however, is more than just a collection of technologies. It is a combination of strategy, process, people and technology (Gartner, 2003; Amiri et al., 2010). Its definition significantly influences the manner in which firms accept and apply (Payne and Frow, 2005).
To identify alternative perspectives of CRM, the researcher has considered definitions and descriptions of CRM from a range of sources. These are summarised in Table 2.1. Definitions identical in nature to those illustrated within the table have been omitted, as they offer no further illumination on the subject. It can be seen from Table 2.1 that CRM can be interpreted under four categories.

1) CRM principally viewed as a matter of Information Technology (IT).

2) CRM principally viewed as a process dealing with CRM activities.

3) CRM principally viewed as a strategic view.

4) CRM viewed as a holistic concept that covers all of the above categories as depicted in Figure 2.1.

In the first category, IT is seen as a critical enabler for CRM initiatives. Many definitions (e.g. Bickert, 1992; Hamilton, 2001; Choy et al., 2003; Raman et al., 2006) consider CRM to be a database or a data-processing instrument to support marketing, sales and field services activities. This vision is considered by Xu and Walton (2005) to be limited as it ignores other aspects, such as management of change and business involvement. Moreover, it fails to link the application of CRM to corporate strategy in order to get the whole organisation working to implement CRM successfully.

In the second category, the emphasis is more on the CRM process. It indicates that CRM involves the implementation of appropriate processes within buyer areas, such as marketing, sales and fields services. Organisations, therefore, have to manage the processes and activities related to CRM in order to generate value. This vision, however, is also considered limited since it neglects other aspects, such as technology (Xu and Walton, 2005; Valsecchi et al., 2007).
In the third category, the emphasis is more on the results gained from a CRM project. It focuses on the role of CRM within the organisation. In this category of CRM definitions, phrases such as “optimises profitability,” “increases revenue,” “implements customer-centric processes” and “improves customer satisfaction” are usually used to indicate that a strategic objective is linked to CRM implementation.

The fourth category, the holistic approach, is involved with defining and building a business strategy and business processes with major support from IT (Tanner et al., 2005).

The definition that will be used in the present research comes under the last heading because it covers the major aspects of CRM considered by Gartner (2003, p.3). They said CRM is:

“A business strategy, the outcomes of which optimise profitability, revenue and customer satisfaction by organising around customer segments, fostering customer-satisfying behaviours and implementing customer-centric processes. CRM technologies should enable greater customer insight, increased customer access, more-effective customer interactions and integration throughout all customer channels and back-office business functions.”

Such a comprehensive and unified definition and understanding of CRM concept is needed in order to manage its implementation successfully (Ko et al., 2008; Foss et al., 2008).
<table>
<thead>
<tr>
<th>Reference</th>
<th>CRM Definition</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bickert (1992)</td>
<td>Database to manage marketing data including promotional aspects.</td>
<td>IT</td>
</tr>
<tr>
<td>Hamilton (2001)</td>
<td>The process of storing and analysing the huge amounts of data produced by sales calls, customer-service centres and actual purchases, supposedly yielding greater insight into customer behaviour.</td>
<td>IT</td>
</tr>
<tr>
<td>Rylas &amp; Payne (2001, p. 3)</td>
<td>“Information-enabled relationship marketing.”</td>
<td>IT</td>
</tr>
<tr>
<td>Choy et al. (2003)</td>
<td>An information technology term for methodologies and software that help an organisation deal with customer relationships in an appropriate way.</td>
<td>IT</td>
</tr>
<tr>
<td>Raman et al. (2006, p. 2)</td>
<td>“A technology-enabled business management tool for developing and leveraging customer knowledge to nurture, maintain and strengthen profitable relationships.”</td>
<td>IT</td>
</tr>
<tr>
<td>Galbreath &amp; Rogers (1999, p. 162)</td>
<td>“Activities a business performs to identify, qualify, acquire, develop and retain increasingly loyal and profitable customers by delivering the right product or service, to the right customer, through the right channel, at the right time and the right cost.”</td>
<td>Process</td>
</tr>
<tr>
<td>Clemons (2000, p. 25)</td>
<td>“Tiny proportion of a company’s customers will generate the bulk of its profits. Identifying, collecting and keeping these clients [are] the very essence of customer relationship management.”</td>
<td>Process</td>
</tr>
<tr>
<td>Day (2001, p. 1)</td>
<td>“A cross-functional process for achieving a continuing dialogue with customers, across all of their contact and access points, with personalized treatment of the most valuable customers, to increase customer retention and the effectiveness of marketing initiatives.”</td>
<td>Process</td>
</tr>
<tr>
<td>Zablah, et al. (2004, p. 480).</td>
<td>“An on-going process that involves the development and leveraging of market intelligence for the purpose of building and maintaining a profit-maximizing portfolio of customer relationships.”</td>
<td>Process</td>
</tr>
<tr>
<td>Reinartz et al. (2004, p. 294)</td>
<td>“A systematic process to manage customer relationship initiation, maintenance and termination across all customer contact points in order to maximise the value of the relationship portfolio.”</td>
<td>Process</td>
</tr>
<tr>
<td>Valsecchi et al. (2007, p. 4)</td>
<td>“CRM is a corporate strategy and a systematic approach based on relational marketing that has the aim to select and manage the clients in order to optimize their value in the long run and, consequently, to maximize value creation for the enterprise.”</td>
<td>Strategic</td>
</tr>
<tr>
<td>Peppers &amp; Rogers (1993)</td>
<td>Employed to focus on individual relationships with customers by using a customer knowledge base in order to build long-term customer retention and growth strategy.</td>
<td>Strategic</td>
</tr>
<tr>
<td>Swift (2001, p. 12)</td>
<td>“Enterprise approach to understanding and influencing customer behaviour through meaningful communications in order to improve customer acquisition, customer retention, customer loyalty and customer profitability.”</td>
<td>Strategic</td>
</tr>
<tr>
<td>Ang &amp; Buttle (2006)</td>
<td>The hub of the business strategy that integrates internal process with external networks, in order to deliver value for targeted customers.</td>
<td>Strategic</td>
</tr>
<tr>
<td>Payne &amp; Frow (2005)</td>
<td>A strategic approach that is concerned with building enhanced shareholder value through the growth of right relationships with key customers and customer segments.</td>
<td>Strategic</td>
</tr>
<tr>
<td>Blery and Michalakopoulos (2006)</td>
<td>A full strategy and process to acquire and retain and partner with customers to create greater value for both the company and the customer.</td>
<td>Strategic</td>
</tr>
<tr>
<td>Wang &amp; Swanson (2008)</td>
<td>A business strategy that helps an organisation in effective management of their customers in order to have maximum value from them.</td>
<td>Strategic</td>
</tr>
</tbody>
</table>
Chapter Two

Literature Review on CRM

<table>
<thead>
<tr>
<th>Reference</th>
<th>CRM Definition</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ko et al. (2008, p. 65)</td>
<td>“Integrated customer management strategy of a firm to manage customers efficiently by providing customized goods and services and maximizing customers' lifetime values.”</td>
<td>Strategic</td>
</tr>
<tr>
<td>Foss et al. (2008, p. 69)</td>
<td>“Firms create customer knowledge in order to segment customers, develop and maintain long-term relationships with profitable customers, determine how to handle unprofitable customers and customise market offerings and promotional efforts.”</td>
<td>Strategic</td>
</tr>
<tr>
<td>Parvatiyar &amp; Sheth (2001, p. 5)</td>
<td>“A comprehensive strategy and process of acquiring, retaining and partnering with selective customers to create superior value for the company and the customer. It involves the integration of marketing, sales, customer service and the supply-chain functions of the organisation to achieve greater efficiencies and effectiveness in delivering customer value.”</td>
<td>Holistic</td>
</tr>
<tr>
<td>Kincaid (2003, p. 41)</td>
<td>“The strategic use of information, processes, technology and people to manage the customer’s relationship with your company (Marketing, Sales, Services and Support) across the whole customer life cycle.”</td>
<td>Holistic</td>
</tr>
<tr>
<td>Zikmund et al. (2003, p. 3)</td>
<td>“A business strategy that uses information technology to provide an enterprise with a comprehensive, reliable and integrated view of its customer base so that all processes and customer interactions help maintain and expand mutually beneficial relationships.”</td>
<td>Holistic</td>
</tr>
<tr>
<td>Gartner (2003, p.3)</td>
<td>“A business strategy, the outcomes of which optimise profitability, revenue and customer satisfaction by organising around customer segments, fostering customer-satisfying behaviours and implementing customer-centric processes. CRM technologies should enable greater customer insight, increased customer access, more effective customer interactions and integration throughout all customer channels and back-office business functions.”</td>
<td>Holistic</td>
</tr>
<tr>
<td>Ngai (2005)</td>
<td>A full set of strategies for managing the relationships with the customers by support and automate the process of marketing, sales and service within the organisation to satisfy the needs of the customer.</td>
<td>Holistic</td>
</tr>
<tr>
<td>Tanner et al. (2005)</td>
<td>A strategy for developing the proper relationship with a customer, a process that is supported by technology or strategic partnerships with all customers.</td>
<td>Holistic</td>
</tr>
<tr>
<td>Richards &amp; Jones (2008)</td>
<td>A strategy that contains set of actions and processes supported by technology to enhance business performance in the customer management field.</td>
<td>Holistic</td>
</tr>
</tbody>
</table>

Table 2-1: CRM Definitions Categorisation
2.3 CRM History

In the period between 1850 and 1900, businesses could sell nearly anything they made (Bose, 2002). In the early 1900s, however, competition was beginning to increase and business owners realised that the customer wielded more power; therefore, organisations had to find reasons for people to buy their products (Bose, 2002). Drucker (1954) states that creating a satisfied customer is the only reasonable definition of business purpose. Furthermore, McKitterick (1957) augmented the development of the marketing concept by stating that the purpose of a business is to react to the customer rather than trying to change the customer to suit the organisation's purposes (see Figure 2.2). According to Bose (2002), the move towards a more customer-centric direction originated in the 2000s when the focus of marketing started to shift from managing products or marketing campaigns to manage the profitability of a one-to-one relationship with the customers. However, Wang (2007) believed that the customer-centric policy arose in the 1960s.
In response to support the growth in the business requirement at that time, the IT industry, especially software providers such as IBM, became involved in developing customised software solutions to meet business requirements (Camdell, 2002). By the end of the 1980s, Relationship Marketing (RM) was introduced as a ready packaged solution to some of the problems faced by mass marketers (Mitussis et al., 2006; Wang, 2007). Shani and Chalasani (1992, p. 44) said that RM is:

“An integrated effort to identify, maintain, and build up a network with individual consumers and to continuously strengthen the network for the mutual benefit of both sides, through interactive, individualized and value added contacts over a long period of time.”

From the 1990s, CRM became increasingly appealing (Light, 2003; Wang and Swanson, 2008; Wang, 2007). It is a concept that has its roots in marketing, and extended to cover sales automation and call centre operations (Light, 2003; Boulding et al., 2005; Wang and Swanson, 2008; Maguire et al., 2007; Osarenkhoe and Bennani, 2007).
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Literature Review on CRM

In parallel with CRM, internet-based tools, such as e-commerce and internet marketing were evolving. As a result, the Electronic CRM (eCRM) concept emerged (Osarenkhole and Bennani, 2007). eCRM is the customer relationship side of Electronic Business (EB) and allows organisations to gain, retain and grow customers by tracking their online preferences and attitudes and then targeting their needs (Jutla et al., 2001; Chan and Lam, 2004). It allows online ordering, and personalised service and help (Xu and Walton, 2005).

2.4 CRM Benefits

A successful CRM implementation helps organisations to obtain competitive advantages over others by improving customer satisfaction and loyalty, increasing revenue and reducing operating costs (Nguyen et al., 2007).

Numerous researchers have discussed the benefits of implementing CRM (Newell, 2000; Bull, 2003; Chen and Popovich, 2003; Buttle, 2004; Blery and Michalakopoulos, 2006; Zgenera and I’razb, 2006; Nguyen et al., 2007; Ko et al., 2008; Richards and Jones, 2008). In general, CRM benefits can be classified by the author of this research into three categories based on different perspectives. The first category is increasing profits and it includes the following (Chen and Popovich, 2003; Buttle, 2004; Forrester, 2005; Zgenera and I’razb, 2006; Ko et al., 2008; Richards and Jones, 2008):

1. Improved ability to target profitable customers.
2. Integrated offerings across channels.
3. Customised products and services.
4. Improved pricing.
5. Providing price discount depending on customer categories.

6. Target customers' needs.

7. Predict probabilities for customers’ churns.

8. Offer new products and services by cross-sell, up-sell and through efficient segmentation according to individual behaviour.

9. Increase revenue per sales representative.

The second category is to do with increasing customer satisfaction and loyalties, and it includes the following (Forrester, 2005; Zgenera and I’razb, 2006; Ko et al., 2008).

1. Managing customer complaints.

2. Improving customer service efficiency and effectiveness.

3. Using all the channels to handle customers' queries and transactions.

4. Decreasing service response times.

5. Increasing customer service productivity.

6. Increasing customer retention.

The third category is reducing the costs and it comprises the following (Forrester, 2005; Zgenera and I’razb, 2006; Ko et al., 2008).

1. Reducing cost of new customer acquisition.

2. Reducing cost of direct marketing.

3. Decreasing customer acquisition cost.

4. Reducing customer service costs.
2.5 Drivers for CRM Implementation

Drivers are the reasons that have encouraged organisations to implement CRM. Indeed, there are many drivers mentioned in the existing literature and these can be categorised by the author of this research into business, technology and environmental.

1. Business drivers (Parvatiyar and Sheth, 2001; Cooper et al., 2005; Xu and Walton, 2005). These drivers function to:
   - Increase customer retention.
   - Improve customer satisfaction level.
   - Improve customer lifetime value.
   - Deliver high quality service.
   - Improve customer expectations.
   - Improve total Quality Management.

2. Technology drivers, which function to (Light, 2003):
   - Improve systems development performance.
   - Reduce number of system developers.
   - Minimise cost of system maintenance.

3. Environmental drivers function to (Parvatiyar and Sheth, 2001; Cooper et al., 2005):
   - Increase global competition.
   - Continue customer demand.
   - Cause a significant revolution in COTS solutions.
   - Improvements in market share.
2.6 CRM Functionality Categories

CRM applications can be classified as operational, analytical, collaborative and eCRM (as discussed in Adebanjo, 2003; Alt and Puschmann, 2004; Chan, 2005; Xu and Walton, 2005; Raman et al., 2006; Sinisalo et al., 2007; Foss et al., 2008).

1. Operational CRM systems aim to make the functions of sales and order management, marketing and services more efficient and effective (as discussed in Adebanjo, 2003; Alt and Puschmann, 2004; Chan, 2005; Xu and Walton, 2005; Raman et al., 2006; Sinisalo et al., 2007; Foss et al., 2008). This is achieved by minimising the cost of day-to-day operations while allowing these functional areas to provide the maximum level of value to customers (Raman et al., 2006). In addition, operational CRM systems contain all the applications that are directly in contact with the customer, such as contact centre, contact management system, mail, fax, sales force, web, chat, etc. (Xu and Walton, 2005). The entire customer’s data are stored in one central database, which is made available to all the organisation's employees who deal with the clients. A full tracking of customer behaviour is carried out on the channels through which he/she is contacted or make contact where possible. This is known as the 360-degree view (Xu and Walton, 2005). The main aim of this type of CRM is to understand exactly the customer’s needs in order to target them. For instance, from an inbound or outbound customer’s call, a CRM system may guide a marketing group through a needs analysis to identify and provide the customer with a market offering that provides value. (Raman et al., 2006)
2. Collaborative CRM occurs when the CRM systems are integrated with back-end ones, such as Enterprise Resource Planning (ERP) or Knowledge Management (KM), which allow organisations to attain a better awareness of their customers (Adebanjo, 2003; Alt and Puschmann, 2004; Xu and Walton, 2005). For instance, employees, suppliers and partners can access a CRM system to provide further customer benefits and improve customer experience (Reinhold and Alt, 2009). In addition, a collaborative selling CRM can provide knowledge to all the employees in order to utilise all the channels, that is, from the call centre to the web, to increase the sales (Xu and Walton, 2005). It can be concluded that collaborative CRM is extended to integrate with back-end systems. This is in contrast to operational CRM which covers customer-facing systems only (i.e. customer care, sales and marketing).

3. Analytical CRM systems store and analyse information about customers to gain a better understanding of customers' behaviours in order to target their needs (Adebanjo, 2003; Alt and Puschmann, 2004; Chan, 2005; Xu and Walton, 2005; Raman et al., 2006; Sinisalo et al., 2007; Foss et al., 2008). These are applications that collect customer information and analyse it in order to improve business decisions and actions (Raman et al., 2006; Foss et al., 2008). For instance, a marketing department could operate a new product strategy based on the input coming from an analytical CRM (Xu and Walton, 2005). In addition, sales people can increase their sales by cross-selling or up-selling products by utilising the data coming from analytical CRM (Raman et al., 2006). Due to the analysis, customers are more effectively segmented and targeted based on their buying profiles (Foss et al., 2008).
4. eCRM enables online ordering and allows organisations to track their customers’ preferences and behaviours in order to create suitable products and services with which they are targeted (Chan and Lam, 2004). eCRM has been defined by Xu and Walton (2005, p. 7) as:

“A web-centric approach to synchronizing customer relationships across communication channels, business functions and audiences.”

It aims to have customer information available on all channels for employees inside the organisation and among external business partners so that they can maintain contact with their customers (Xu and Walton, 2005).

Although most CRM application vendors continue to expand the system’s functionality, they still vary with respect to its usage (Gartner, 2003). A study conducted by Gartner (2003) for ten different CRM vendors, revealed that 25% vendors cover most of operational functions while only 10% were able to support all the required CRM functionalities.

2.7 CRM Key Development Stages

Similar to other IT solutions, CRM projects are normally implemented in stages (Bose, 2002; Oracle, 2003; Wanger and Zubey, 2007). These stages are quite similar to other IT package implementations, such as ERP or EB (Wanger and Zubey, 2007). Few studies have been found in the CRM literature that explain the Key Development Stages (KDSs) for CRM implementation. For instance, Bose (2002) listed eight KDSs for CRM implementation namely: planning, research, system analysis, design, construction,
implementation, maintenance, documentation and adaptation. CRM vendors, such as Oracle (2003), proposed a number of stages that are very similar divided the KDS into eight stages, namely plan, discover, define, design, configure, validate, deploy and sustain.

Later and particularly in 2006 these stages were updated by Oracle to seven stages by the removal of the ‘plan’ stage. In addition, the ‘design’ stage was changed in order to create a ‘prototype’ stage. In this revised system, the implementation process commenced with the ‘discover’ stage followed by the ‘define’ stage. Wanger and Zubey (2007) created a five-stage system by merging some stages, such as ‘analysis’ and ‘design’.

As all the above studies are similar, this research will use the names of activities proposed by Oracle (2003) and merge the studies under one umbrella by considering all the activities suggested in each stage (see Figure 2.3).
2.7.1 The Planning Stage

In this stage, in common with other project implementations, top management interest and commitment is essential (Bose, 2002). Overall strategies to be used as the baseline for all the development stages are established. The measurable parameters to assess business objectives are developed, the CRM vision are clearly expressed and the scope of the project is reviewed (Oracle, 2003; Pavlin, 2004). Business process analysis and re-engineering is one of the important activities at this stage to prepare the organisation for the move to a customer-centric environment (Bose, 2002). Bose (2002) suggests that customer and decision interactions are required to achieve a customer-centric environment. In the first interaction, the organisation must identify in detail how, when
and where it will be interacting with customers in order to re-engineer all their business process to engage this interface. In the second interaction, the decision-making procedures need to be revised to become customer focussed. In addition, it is important what type of data needs to be available at various decision-making levels (Bose, 2002).

2.7.2 The Defining Stage

The Defining stage is used to delineate the project’s scope, approach, high level business requirements, the required resources, CRM measurements, project management controls, business processes and project planning documents (Bose, 2002; Oracle, 2003; Oracle, 2006). In addition, it is necessary to identify the roles and responsibilities of the project management team including that of the project manager and communicate them to all identified project stakeholders (Oracle, 2003).

The organisation’s structure and culture needs to be clear and documented before the start of the design stage (Bose, 2002; Oracle, 2003). The infrastructure, such as the system’s hardware and software, will need to be considered at this stage (Bose, 2002).

2.7.3 The Discovery Stage

The Discovery stage follows on from the defining stage. Here there is a need for an in-depth collection of detailed business requirements, which should include the functional and technical specifications that can achieve the organisation’s business objectives (Oracle, 2003; Oracle 2006). In particular, any issues that may affect the design of the CRM system, such as that found within a gap analysis document, should be identified and documented as a typical deliverable of this stage (Oracle, 2003).
This stage is very important in shaping CRM implementation and in achieving the eventual success of the system. It is, therefore, necessary to address the following issues (Bose, 2002).

2.7.3.1 Customer Interaction

It is vital to make all customer information available to the end-user to help them manage the contact with the customers either by automated channels, such as Automated Voice Response (AVR), or existing agents who can handle customers' calls (Bose, 2002).

2.7.3.2 Expertise Involvement

Experts from either CRM vendors or independent consultants are important in helping organisations to review the final details of their business requirements before moving to the design stage (Bose, 2002; Wanger and Zubey, 2007).

2.7.3.3 Phase the CRM implementation

In order to reduce implementation risks, increase buy-in and control the needed resources, organisations should phase in implementation (Bose, 2002). Implementation can start with specific functions, such as the call centre, and then allowed to grow phase by phase introducing more functions (Dyche, 2002).
2.7.3.4 Customer Data

Bose (2002) suggested three steps to re-design customer data to become customer-focussed and gain the advantage of adopting a CRM solution as follows:

- Integrate all the customer data i.e. organisations should have one view of customers in all their departments, such as marketing and sales (Bose, 2002).
- Expand the customer’s data profile non-transactional data, such as general enquiries, comments and suggestions. Complaints need to be integrated with a customer’s data to obtain a comprehensive view of his/her behaviour and satisfaction (Bose, 2002).
- Integrate the customer’s data with legacy systems, such as ERP to fulfil the customer’s request (Bose, 2002).

2.7.3.5 System Scalability

As CRM solutions grow to cover different functionalities, it is important that organisations select the hardware and software that is able to cover their future needs (Bose, 2002).

2.7.4 The Design Stage

The Design stage includes detailed specifications, which represent the business requirements that were finalised at the discovery stage (Oracle, 2003). The main aim of this stage is to,

“Design a solution that best meets the identified business requirements.” (Oracle 2003, p. 60)
Vendor expertise and integrator technical team involvement is crucial to produce a detailed specification document that includes all the technology, such as the hardware software that is needed to integrate CRM solutions with all the required systems to fulfill the organisation’s business requirements (Bose, 2002; Oracle, 2003; Oracle, 2006). At this stage, the system integrator should focus on designing a full prototype for all the screens, views and windows of the CRM application (Oracle, 2006). Due to the importance of the prototype, Oracle (2006) changed the name of the phase to ‘create prototype’. This stage is the basis for the construction stage and it is important to develop a testing and training plan (Oracle, 2003).

2.7.5 The Construction Stage

The Construction stage constructs what was developed during the design stage (Bose, 2002; Oracle, 2003). The project’s implementation needs to be completed in phases to avoid the complexity of this stage (Bose, 2002). Organisations should ensure that they have received correct technical resources from both the system integrator and the CRM vendor to construct what was agreed at the design stage (Bose, 2002). During this stage, the organisation needs to ensure that the integrator is configuring the CRM application rather than customising it. As the configuration is the main part in this stage, Oracle (2006) named it the configuration stage. Overview preparation, such as a strategy for management change, user-adoption, training and testing is required for the full deployment of the CRM application (Oracle, 2003).
2.7.6 The Validation Stage

The Validation stage precedes the deployment stage the CRM application sponsor needs to test and validate the whole application before it goes live (Oracle, 2003). This stage was added by (Oracle, 2003; Oracle, 2006). In the validation stage, a full function test of the new application needed to be completed.

This stage is composed of a two-part application test: (1) the full functional test using production data (2) a user acceptance test (Oracle, 2003; Oracle, 2006).

2.7.7 The Deployment Stage

The Deployment stage moves the CRM application from testing to the production environment. It can also be termed the implementation stage (Bose, 2002). In order to validate the systems readiness for the full production environment, the organisation should conduct a pilot test in a subset area of the business, such as the call centre, with a few users that are provided with all the system's features (Oracle, 2003; Oracle, 2006).

The positive and negative feedback from the pilot test will be used to inform the full deployment of the new CRM application (Oracle, 2003). At this stage it is vital to verify that the end-users are well trained and know how to use the application, the required business changes are in place, the technical infrastructure is ready to bear the application in an effective way, and the support team is highly skilled and sufficient in number (Bose, 2002; Oracle, 2003; Oracle, 2006). Middle and senior management need to be trained to engage with the application and to extract any reports that may be required about their customers and employees’ performances (Bose, 2002).
2.7.8 Adaptation and Sustain Stage

In the Sustain stage, it is necessary to measure the outcomes of using the application against the objectives of implementation as the CRM system is still in its infancy (Oracle, 2003). Measurements, such as an increase in customer numbers, customer retention rates and customer satisfaction will be used to assess the success of the application. During this stage, continuous improvement of CRM functionality and user adoption is crucial to overcome obstacles and drive the application to the main objectives of the implementation. By using the application, the organisation should be able to know more about their customers’ needs, which will help in defining any changes that are needed.

2.8 CRM and Culture

The word 'culture' has become to be used regularly as a symbol for common values and behaviours within a particular organisation or other types of social groupings (Walsham, 2002). Ali and Alshawi defined culture as:

“A set of general concepts and ideas as a way of looking at the world.” (Ali and Alshawi 2006, p. 2)

Specifically, Schein (2010, p. 18) defined an organisation culture as:

“A pattern of shared basic assumptions learned by a group as it solved its problems of external adaptation and internal integration, which have worked well enough to be
considered valid and, therefore, to be taught to new members as the correct way to perceive, think and feel in relation to those problems.”

Studies on culture and IT adoption have revealed three types of culture that can affect the uptake of technological solutions: (1) national culture (2) organisational culture, and (3) individual culture (Ali and Alshawi, 2004). Walsham (2002) explained how culture influences Indian people with respect to Geographic Information Systems (GISs). He stated, as part of their culture, that Indian people are not map-based; they rarely use maps in day-to-day life, which is not the case in Western countries. In another study in developing countries, Braa et al. (2004) reported cultural issues when they investigated the adoption of a health information system that had been transferred from South Africa to Mozambique. There were critical cultural issues concerning IT in developing countries. These included local adaptation, standardisation versus localisation and politics (Walsham and Sahay, 2006). Culture has proven to be a significant factor in the adoption of IT within developing countries. For instance, Al-Shehry et al. (2006) stated that culture is one of the problems for IT adoption in the KSA and specifically, within the private sector.

Culture can cause failure in CRM projects (CapGemini, 2002; Gartner, 2007). According to the outcome from the McKinsey survey of 60 large companies, 59% that successfully implemented CRM had addressed the cultural changes required by the CRM system’s implementation but 33% reported failure despite stating that they had addressed the cultural changes that were required (cited in Iriana and Buttle, 2006). A study performed by Gartner (2007) revealed that the top three CSFs for CRM
implementation are related to an organisation’s culture (e.g. developing internal staff and change management and organisational collaboration). People’s resistance to use the new CRM procedures and processes may lead to implementation failure. Thus, many researchers suggest that employees be encouraged to change their behaviour and attitudes, and create a culture that is conducive to successful CRM implementation (Gartner, 2007; Iriana and Buttle, 2006).

Gartner (2007) emphasised that customers are often influenced by an organisation's culture. A survey performed by DMR Consulting (cited in Iriana and Buttle, 2006) shows that customer-centric organisations met 71% of their CRM implementation goals compared to 53% of non-customer-centric organisations. In addition, two research studies revealed the impact of customers and organisational culture on CRM implementation within the KSA. (Ali, 2007; Almotairi, 2010) (cf. Section 2.9.4).

2.9 The Research Context (KSA)

A developing or a less-developed country is characterised by having a population that possesses a low standard of living, a less developed industrial base and a low human development index relative to other countries (Sullivan and Sheffrin, 2003; United Nation, 2007).

Notwithstanding the debate regarding classification with respect to developed and developing countries (NOO, 2007; United Nation, 2011), the Nation Online Organisation (NOO, 2007) categorised countries as developed or developing using five criteria:
The KSA has been classified as a developing country in terms of its paucity of political rights, civil liberties, and lack of press freedom. The International Monetary Fund (2012) has also classified KSA as a developing country. The United Nations (2011) classified the KSA as a developing country using via its categorisation of human development, into which are very high human development, high human development, medium human development and low human development. The United Nations stated in their report for 2007 that the first category referred to developed countries and the last three to developing ones. As the KSA falls into the high human development category, it is considered a developing country.

The following sections will provide some information that pertain to the KSA in terms of its geographical and demographical characteristics, political system and culture.

### 2.9.1 KSA Characteristics

King Abdulaziz Al-Saud established the modern KSA in 1932. It is the largest country in the Arabian Peninsula and Middle East and the thirteenth largest in the world. It occupies an area of 2,150,000 square kilometres, which is about one quarter of the size of United States (Brown, 2005; MOFA, 2005; USDS, 2006; CDSI, 2011). According to
the Central Department for Statistics and Information (CDSI, 2011) of the KSA, its total population is approximately 28.4 million with a yearly growth rate of 2.28%. Nearly 19.5 million of the population are Saudi nationals of which 49.5% are females and 50.5% are males. Approximately 9 million foreign nationals live and work in Saudi Arabia in order to support their families (Brown, 2005; MOFA, 2005; SEUS, 2006; CDSI, 2011).

The KSA’s capital is Riyadh. Its first language is Arabic and the Riyal is its main currency (MOFA, 2005; SEUS, 2006). The Country is located in the southwest of Asia (see Figure 3.1), and acts as bridge between the three continents of Asia, Africa and Europe. The KSA is bounded by the Arabian Gulf, Qatar and United Arab Emirates to the east, Oman and Yemen to the south, Jordan, Iraq and Kuwait to the north, and the Red Sea to the west (MOFA, 2005; SEUS, 2006). The KSA is considered the heart of the Islamic faith for two reasons; (1) it is the land of the two holy cities Makkah and Medina, and (2) it is the location of the birth of Islam (SEUS, 2006). The KSA is the world's largest oil producer (MOPM, 2009). It hosts and organises more than three million pilgrims every year for performing Hajj on particular days (Hajj is a compulsory journey to Makkah at specific time in the year) as well as more than 5 million persons each year to perform Umrah in 2011 (Umrah is an optional journey to Makkah at any time during the year) (MOH, 2011). IT spending in Saudi Arabia was US$ 3.5 Billion in 2010, and it is expected to reach US$ 5.7 Billion by the end of 2014 (RNCOS, 2011), reflecting the high growth in IT investment within the Country. Gartner predicts that CRM software sales within the Middle East and Africa (MEA) region reached $113.8
million, in 2008, and is expected to grow by nearly $209 million, in 2012 (CRMForecast, 2012).

![Figure 2-4: The KSA Map](http://maps-asia.blogspot.com)

### 2.9.2 KSA Political System

KSA is a kingdom: the King is the governor, the prime minister and supreme commander-in-chief. Either a previous king or the royal family committee normally appoints the successor to the throne (SEUS, 2006; BOE, 2011). The Crown Prince occupies second position in the KSA. The King or the royal family committee normally appoints him (SEUS, 2006; BOE, 2011). In the KSA, there are two councils (SEUS, 2006; BOE, 2011; Majlis Al-Shura, 2012a):
Chapter Two

Literature Review on CRM

(1) The Ministries Council, which comprises 22 government members, and is responsible for the administration of the whole country.

(2) The Al-Shura Council, which is responsible for providing a consultative to the King and government by reviewing and suggestion changes to the current laws and rules of the country. Recently the KSA announced that a number of females will be allowed to participate as members of the Al-Shura Council from 2013 (Alarabiya, 2011). The Al-Shura Council has 150 members and takes representations from the following 13 committees (Majlis Al-Shura, 2012b):

1. Islamic and judicial affairs.
2. Social, family and youth affairs.
3. Economic affairs and energy.
5. Educational and Scientific Research Affairs.
6. Cultural and Informational Affairs.
7. Foreign Affairs.
10. Transportation, Communications and Information Technology.
12. Administration, Human Resources.

Only the King has the right to nominate members to both the Ministries and Al-Shura for periods of up to four years, and this period can be extended for many times for the
same member (Majlis Al-Shura, 2012a). The KSA follows Islamic (Shariah) laws in their judicial system (MOFA, 2006; Majlis Al-Shura, 2012a).

In 1992, a new provincial council system was introduced, which divided the country into thirteen provinces (Riyadh Municipality, 2005). The first municipal elections were held whereby Saudi male citizens were able to publicly vote in order to elect half the members of each municipal council (MOFA, 2005). The Minister of Municipal and Rural Affairs appoints the remaining fifty percent of the council members (Riyadh Municipality, 2005). In 2011, the Kingdom announced that females would be allowed to participate in the next municipal council elections (Alarabia, 2011).

2.9.3 KSA Culture

Abu-Musa (2008) pointed out that Saudi culture is “unique [and] shaped by the influences of religion, tradition, tribal structure and distinct values and behaviours” (p. 7). As the religion of the majority, Islam acts as the main source for shaping people’s norms, values, patterns, traditions, obligations and privileges (Al-Saggaf and Wagga, 2004). Similar to other Arab countries, affiliation to the family and the tribe are important in order to obtain support in everyday life (Al-Saggaf and Wagga, 2004). A family is created by a legal marriage between a man and a woman. Families normally consist of a mother, father, sons, daughters, grandfather, grandmother, uncles, aunts and cousins. Unlike western countries, women in the KSA have to abide by difference and provides, such as the following:

(1) In order to prevent illegal relationships and for modesty, Saudi women have to wear a veil called an Abaya when leaving home (Dutta, 1998).
(2) Working is voluntary for females as men are obligated to financially their womenfolk support such as mothers, daughters and wives.

(3) Under Saudi law, women are not allowed to drive cars (Dutta, 1998).

Gender segregation is part of Saudi culture. The separation between male and female is observed in many professional places, such as schools, universities and bank branches. In places, such as hospital departments and shopping centres, males and females are allowed to work together.

2.9.4 CRM Implementation within the KSA

This section discusses the previous studies into CRM implementation within the KSA, only, two research studies were found on CRM implementation within the KSA; these are as follows:

Ali (2007) conducted a comparative study of CRM implementation between the United Kingdom (UK) and the KSA. The main aim of the research was to explore CRM implementation within varied organisations. A qualitative case study was applied as a research strategy. She identified eleven CRM's CSFs: top management support, business plan and vision, phased implementation, collaboration, data ownership, end-user training, end user acceptance, customer segmentation, alignment of CRM with organisation strategy, language considerations, and internet presence.

Another qualitative case study was performed by Almotairi (2010) within two telecom companies’ in the KSA. He proposed a framework to assist in evaluating the feasibility of CRM implementations within developing countries. He identified that a culture of
employees and customers has an effect on CRM implementation. He recommended two areas for further work: (1) Investigate the cultural impact of customers and employees on CRM implementation within developing countries; (2) Identify the CSFs of CRM implementation within developing countries and compare them with those in developed countries.

Although both of these studies acknowledged that employees and customer culture was an issue within the KSA, they did not explain what type of cultural impact arose, nor explain how culture impacted on CRM implementation. Moreover, they not include customers in their empirical studies. These two studies and other CRM implementations within the developed countries (cf. Section 3.3) will be analysed and evaluated in Section 3.4.

2.10 Conclusion

This chapter discussed the first part of the literature review. It provided a general idea of the CRM concept. It covered the definitions of CRM, its benefits, history, drivers, categories and key components, and CRM and culture. It also focused on presenting the KSA context and discussed various issues particularly KSA characteristics, its political system and culture. Finally, it offers analysis of previous research on CRM implementation within the KSA. This chapter forms the basis for the second part of the literature review, which is described in the following chapter.
Chapter Three: Literature Review on Critical Success Factors

3.1 Introduction

This chapter contains the second part of the literature review. It describes the previous studies about the effects of CSFs on CRM implementation. The chapter explains the CSF concept. In addition, the chapter describes the investigations and analyses of previous studies conducted on CSFs and proposes a taxonomy for these.

3.2 Critical Success Factors

In the early 1960s, the idea of CSFs was discussed and applied by Daniel, although little attention was paid to the concept until a decade later, when Rockart (1979) developed the idea of identifying the critical information needs of top executives.

Definitions of CSFs have remained consistent, since Rockart (1979, p. 85). He defined them as:

“The limited number of areas in which results, if they are satisfactory, will ensure successful competitive performance for the organisation.”

CSFs are the key factors, which are very critical: people need to give full attention to them in order to achieve success in their area (Ngai et al., 2008).

There are many ways to recognise CSFs; these include via benchmark analysis, senior expert people, external consultants, best practice analysis, the competitors data, internal data of companies and marketing strategy (Tsao et al., 2004). In all these cases, CSFs
are derived from the opinions and mental models of stakeholders in the practice. Their derivation from interviews, expert analysis, focus groups or hermeneutic analysis of documents is essentially an interpretive exercise, resulting in a social construct (Sanad et al., 2010).

According to Rockart (1986), there are four basic types of CSFs.

1. Industry CSFs, which come from specific industry features.
2. Strategy CSFs, which come from the chosen competitive strategy of the business.
3. Environmental CSFs, which come from economic or technological changes.
4. Temporal CSFs, which come from internal organisational needs and changes.

Sanad et al. (2010) point out that there are four characteristics for CSFs.

1. CSFs are interpretive. There will be differences across an organisation and between managers. Their focus will be on the personal constructs of managers and their worldviews.
2. CSFs are dynamic. They will change as people’s views and the environment changes, and they are influenced by context.
3. CSFs are interlinked. They represent factors at nodes in a network of influences, which need to be examined together in order to determine best practice, identify research issues and reflect on strategy. CSFs may indicate a causal mechanism. This may involve a direct cause where a CSF results in a particular outcome and an indirect cause where a CSF is part of a chain of causality.
4. CSFs are hierarchical and can be identified at various levels in an organisation or a project. In a project, CSFs may apply to the overall strategy and external influences
at a higher level and to individual and group activities with respect to the detail of project implementation.

In addition, an individual factor can be recognised, which is critical owing to its frequent connection to a successful outcome (Kim and Pan, 2006). Organisations should devote substantial attention to their CSFs in order to aid success in their area (Ngai et al., 2008). In terms of CRM implementation, CSFs can be viewed as those activities and practices that should be addressed in order to ensure successful implementation.

The study of CSFs in CRM implementation must start with a review of existing CRMs in the research literature, which leads towards an initial classification of CSFs in a taxonomy (Sanad et al., 2010) (cf. Section 3.5).

### 3.3 Previous Studies of CRM Implementation

This section discusses the CSFs that affect CRM project implementation based on a comprehensive analysis of the relevant literature. Through an in-depth review of the academic and practitioner literature regarding CRM implementation, the researcher found fourteen relevant studies (see Table 3.1) in addition to those already described in Sections 2.8 and 2.9.4 (i.e. CapGemini, 2002; Ali, 2007; Gartner, 2007; Almotairi, 2010). These were Kim et al. (2002), Chen and Popovich (2003), Ocker and Mudambi (2003), Silva and Rahimi (2003), Alt and Puschmann (2004), Al-Ajlan and Zairi (2005), Forrester (2005), Blery and Michalakopoulos (2006), Gartner (2006), Oracle (2006b), Mendoza et al. (2007), Foss et al. (2008), King and Burgess (2008), and Ranjan and Bhatnagar (2008). The above-mentioned studies will now be reviewed.
Kim et al. (2002) performed four qualitative case studies with different size of organisations. They identified four main categories of influences (organisation, process, technology and project) with different factors in each. Organisation influences comprised three main factors; championship, top management support, and resource. Process influences consisted of CRM process and strategy. Technology influences comprised complexity, compatibility, source system, channel integration and system design. Project influences consist of user participation, and project team skills. The authors identify some interrelationships between few factors without mentioning the types of these relationships. In addition, there was omission of a mechanism for achieving interrelationships between the CSFs.

Chen and Popovich (2003) performed a study based on secondary data. They depicted a CRM implementation model that aligned people, process and technology as main CSFs for CRM implementations. In addition, they identified, top management commitment, organisational culture and integration with backend systems, such as ERP, as CSFs for CRM implementations.

Ocker and Mudambi (2003) proposed a model with three classes of influences (intellectual, technological, social) with different factors for each. Intellectual influences comprised of eight factors: CRM strategy, top management support, CRM champions, organisation structure, business processes changes, personnel incentive and rewards, corporate planning strategy, and structure and planning. Technological influences included CRM application scope, complexity, customisation, project management team skills and experienced, knowledge management, and integration with back-end systems.
Social influences consisted of cultural change, stakeholders’ collaboration and involvement, and user Awareness.

Silva and Rahimi (2003) used a qualitative case study strategy to examine whether Holland and Light's (1999) ERP’s CSF model can be applied for CRM implementation. A semi-structured interview method was used for data collection from 40 participants, working within twenty companies taken from different industries. They identified that the CSFs for CRM implementation were very similar to the ones for ERP implementation and that the model can be applied for CRM implementation, with an additional three CSFs; i.e. CRM philosophy, technical tasks and connectivity. The model classified the CSFs into two main categories: strategic (e.g. CRM philosophy, project mission, top management commitment, and project plan) and tactical (e.g. client consultation, connectivity, skillful personnel, technical tasks, client acceptance, monitoring and feedback, communication, troubleshooting, and business process change and software configuration).

Alt and Puschmann (2004) performed six qualitative case studies. They short-listed the cases based upon the results of a quantitative questionnaire sent to 55 organisations. Six CSFs for CRM implementation emerged from the data that was collected. These were centralised customer information, stepwise implementation, change management, top management support, minimise the customisation, and project timeframe.

Al-Ajlan and Zairi (2005) conducted a study on CSFs for CRM implementation and proposed a framework based on secondary data and fieldwork. They determined three
main categories of influences (dominant, strategic and technical) with different factors in each. Dominant influences have a big impact on CRM implementation. Dominant influences comprise five main factors: developing a customer-centric strategy, executive sponsorship, organisational change, business justification, and project planning and management. Strategic influences consist of project vision, segmentation and targeting, holistic approach, business process, resources and budget, understanding customer needs and resistance to change. Technical influences include software selection, client consultation, data and information, and system integration.

Forrester (2005) conducted in-depth personal interviews by telephone with executives at 22 leading organisations. The respondent executives were the senior persons responsible for CRM initiatives in their respective organisations and had a close knowledge of the successes, challenges and deployment approaches of these programmes. They identified five main groups of influences (strategy and governance, objectives and processes, customer data management, user adoption, and technology) with different factors in each. Strategy influences consist of strong sponsorship and business-led CRM and governance structure. Objective and process influences comprise of define objectives and processes and a phased approach. User adoption influences consist of end user involvement and emphasis on software usability. Technology influences include simplify the CRM platform and manage the vendor relationship actively.

Blery and Michalakopoulos (2006) conducted a qualitative single case study with the main aim of analysing the CRM implementation. They specified fourteen CSFs:

1. Holistic approach.
2. CRM vision and strategy.


4. The integration of CRM systems.

5. Software selection.


7. Organisation culture.

8. Project management.

9. Project time lines.

10. Budget control.

11. Good collaboration between the consultants and the project team.


13. Vendors experts.


Gartner (2006) identified eight factors for the success of a CRM project:

1. Confirm that the organisation is ready for CRM.

2. Align CRM objectives with corporate objectives.

3. Identify the goals and metrics

4. Benchmarks.

5. Stakeholders awareness.

5. Prioritise the CRM project portfolio.

7. Build a solid CRM business case.

8. Select the right integrator.
Oracle (2006b) conducted a survey of 2500 companies worldwide, which have previously implemented their application, to assess the effect of CSFs in adopting CRM systems. They specified ten factors that were critical. These were: create measurable business goals, align business and IT operations, top management support, business driven, minimise customisation, involve qualified consultants, early end users involvement, end users training, phased approach, and measure, monitor and track.

In an action research strategy conducted by Mendoza et al. (2007), emergent CSFs were classified into three main categories: processes (e.g. customer information management and inter-departmental integration), people (e.g. senior management commitment and creation of a multi-disciplinary team) and technology (e.g. information systems integration and support for operational management).

Foss et al. (2008) identified the CSFs for successful CRM implementation by using a qualitative questionnaire. Three CSFs for CRM implementation emerged from the data that was collected. These were a phased approach, a business process change to fit the solution and time frame.

King and Burgess (2008) investigated the effect of CSFs on CRM implementation using secondary data. They proposed the following eight CSFs for CRM implementation:

1. Communication of CRM strategy.
2. Knowledge management capabilities.
3. Willingness to change processes.
4. Technological readiness.
4. Top management support.

5. Culture change capability.


7. Systems integration capability.

Lastly, Ranjan and Bhatnagar (2008) investigated the effect of CSFs on CRM implementation using secondary data. They indicated that there were ten CSFs for CRM implementation:


2. Top management support.

3. Skilful personnel.

4. Project plan.

5. Monitoring the progress of the project.

6. Communication.

7. Privacy and security.

8. Integration.


10. Project cost and budget.
### Literature Review on Critical Success Factors

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<tr>
<th>Reference</th>
<th>Category</th>
<th>Factors</th>
<th>Methodology</th>
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2. Top management support  
3. Resources          | Qualitative (case study, interview) |
|                    | Process  | 4. CRM Process  
5. CRM Strategy          |                                                  |
|                    | Technology | 6. Complexity,  
7. Compatibility,  
8. Source System,  
9. Channel Integration  
10. System Design.        |                                                  |
|                    | Project  | 11. User Participation  
12. Project Team Skills |                                                  |
2. Top Management Commitment  
3. Organisational Culture  
4. Integration with Backend Systems | Secondary data |
| Ocker and Mudambi (2003) | Intellectual | 1. CRM Strategy  
2. Top Management Support  
3. CRM Champions  
4. Organisation Structure  
5. Business Processes changes  
6. Personnel Incentive and Rewards  
7. Corporate Planning  
8. Structure and Planning | Secondary data |
|                    | Technological | 9. CRM Application Scope  
10. CRM Application Complexity  
11. CRM Application Customisation  
12. Project Management Team Skills and Experienced  
13. Knowledge Management  
14. Integration with Back-end Systems |                                                  |
|                    | Social   | 15. Cultural Change  
16. Stakeholders Collaboration  
17. Stakeholders Involvement  
18. User Awareness |                                                  |
| Silva and Rahimi (2003) | Strategic | 1. CRM Philosophy  
2. Project Mission  
3. Top Management Commitment  
4. Project Plan | Qualitative (Case Study) |
|                    | Tactical  | 5. Client Consultation  
6. Connectivity  
7. Skilful Personnel  
8. Technical Tasks  
9. Client Acceptance  
10. Monitoring and Feedback  
11. Communication  
12. Troubleshooting  
13. Business Process Change and Software Configuration |                                                  |
2. Stepwise Implementation  
3. Change Management  
4. Top Management Support  
5. Minimise the Customisation  
6. Project Timeframe | Qualitative (questionnaire and case study) |
## Literature Review on Critical Success Factors

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<td>7. Build a Solid CRM Business Case</td>
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<td>8. Select the Right Integrator</td>
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### Chapter Three

#### Literature Review on Critical Success Factors

<table>
<thead>
<tr>
<th>Reference</th>
<th>Category</th>
<th>Factors</th>
<th>Methodology</th>
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<td>2. Align Business and IT Operations</td>
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<td>3. Top Management Support</td>
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<td>4. Business Driven</td>
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<td>5. Minimise Customisation</td>
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<td>6. Involve Qualified Consultants</td>
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<td>7. Early End Users Involvement</td>
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<td>8. End Users Training</td>
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<td>9. Phased Approach</td>
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<td>10. Measure, Monitor and Track</td>
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<td>2. People</td>
<td>2. Project Management Team Skills</td>
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<td>3. Technology</td>
<td>3. Define Business Requirements</td>
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<td>4. Inter-departmental Integration</td>
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<td>5. Communication of the CRM Strategy to the Staff</td>
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<td>6. Staff Commitment</td>
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<td>7. Customer Information Management</td>
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<td>8. Meeting Business Requirements</td>
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<td>9. Support for Operational Management</td>
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<td>10. Information Systems Integration</td>
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<td>Foss et al. (2008)</td>
<td>N/A</td>
<td>1. Phased approach</td>
<td>Qualitative (Questionnaire)</td>
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<td>2. Business process change to fit the solution</td>
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<td>3. Timeframe</td>
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<td>2. Knowledge management capabilities</td>
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<td>3. Willingness to change processes</td>
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<td>4. Technological Readiness</td>
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<td>5. Top management support</td>
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<td>6. Culture change capability</td>
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<td>7. Process change capability</td>
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<td>8. Systems integration capability</td>
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<td>2. Top Management Support</td>
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<td>3. Skilful Personnel</td>
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<td>4. Project Plan</td>
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<td>5. Monitoring the progress of the project</td>
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<td>6. Communication</td>
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<td>7. Privacy and security</td>
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<td>8. Integration</td>
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<td>9. Business process</td>
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<td>10. Project Cost and Budget</td>
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**Table 3-1: Summary of Literature Review Identifying CSFs Influencing CRM Implementation Within the Developed Country**

### 3.4 Analysis Literature of Previous Studies

Many pieces of research have investigated the effect of CRM on CSFs implementation.

The success factors proposed in the literature are fragmented and discuss those
highlighted by particular research study relevant the researchers' background and interests. A set of variables taken solely from one perspective will only explain how well a small proportion of success factors contribute to the successful CRM implementation within organisations. The following points highlight the important gaps and weaknesses of previous studies on this topic.

- All the studies in the literature investigated CSFs only from an organisation’s perspective. None included the customer’s perspective as part of their investigation.
- In spite of one limited attempt study (Kim et al., 2002) to identify some interrelationships between factors, none of the studies identified comprehensive interrelationships between CSFs of CRM implementation.
- None of the studies discussed the comprehensive relationships between CSFs and the key development stages for CRM implementation (such as those outlined in Section 2.7).
- Culture plays a major role in CRM implementation. It is ranked one of the top three factors for CRM CSFs (cf. Sections 1.1 and 2.8). Despite this, only one of the studies (cf. Section 2.9.4) investigated CSFs for CRM implementation within the KSA.
- Although there were two studies within the KSA (cf. Section 2.9.4), these acknowledge that employee and customer culture was an issue within the KSA, they do not explain what type of cultural impact or how it affected CRM implementation. Moreover, they did not include customers in their empirical study.
- Several studies are not empirical and are based only on a literature review or on stated lessons learned.
The studies utilised a case study research strategy, a survey research strategy or an action research strategy.

Therefore, there is a gap for research on CRM implementation within the KSA, which:

- Takes into account both organisations’ and customers’ experiences.
- Identifies the comprehensive interrelationships between CSFs and CRM implementation.
- Identifies a comprehensively the relationships between CSFs and key development stages of CRM implementation.
- Is used to generate a unique, integrated model that includes CSFs and their interrelationships to support effective CRM implementation.
- Investigates the cultural impact on CRM implementation within the KSA.

### 3.5 Proposed Taxonomy of CSFs in CRM Implementation

The factors listed in Table 3.2 are distilled from the different articles mentioned in sections 3.4 and 2.8 (i.e. CapGemini, 2002; Gartner, 2007), which focus on identifying the CSFs for effective CRM implementation within the developed countries. In total, they were able to be categorised into three subgroups representing various dimensions related to CSFs of CRM implementation. The subgroups with their factors are listed and described in Table 3.2.
<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Factors</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic CRM factors</td>
<td>1. CRM strategy</td>
<td>A clear strategy and simple vision for building customer-centric environment will help smooth CRM implementation. In addition, top management commitment ensures that CRM efforts will be implemented in the most effective manner. Continuous top management support and commitment together with the provision of the necessary resources and budget positively influence CRM project implementation. Furthermore, building a business case will help to allocate the right budget and resources. Culture plays a major role in successful CRM implementation for both employees and customers. Seeing CRM solution as holistic (strategic, process and technology) from all the stockholders is important for the success of implementation. Having the project driven by business is essential to align their vision with project vision and get early buy-in from their employees.</td>
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<tr>
<td></td>
<td>2. CRM vision</td>
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<td>3. Developing customer-centric strategy</td>
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<td>4. Top management commitment and support</td>
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<td>5. Building a business case</td>
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<td>6. Providing necessary resources</td>
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<td>7. Budget allocation</td>
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<td></td>
<td>8. Organisational culture change</td>
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<td>9. Holistic approach</td>
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<td>10. Business-driven</td>
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<tr>
<td>Tactical success factors</td>
<td>11. Systems integrator selection</td>
<td>Selecting the right solution and integrator will help to overcome the challenges of implementation. Moreover, meeting the time line for integration with other applications is a very critical issue. Data cleansing is crucial because garbage-in means garbage-out. In addition, in order to get full benefit out of CRM, such as customer targeting and segmentation, businesses need to have clean data. Project management skills and experience will help to meet project time lines and manage the relationships with CRM’s vendor. Moreover, having expertise from vendor and external consultants to audit and monitor the progress of the project is critical for successful implementation. Implementing the project in phases will minimise the risk and give more time for user acceptance and awareness. Furthermore, it will help to get buy-in from the business during the early stages of the project. Knowledge management is playing a major role for CRM awareness for entire organisation. Troubleshooting &amp; technical support is essential during and after the implementation to overcome any difficulties that may face by technical or end-users.</td>
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<td>12. Solution selection</td>
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<td>13. Project time line</td>
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<td>14. Integration with back-end systems</td>
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<td>15. Data quality</td>
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<td>16. Data privacy</td>
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<td>17. Project management qualification and Skills</td>
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<td>18. Vendors experts</td>
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<td>19. External consultants</td>
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<td></td>
<td>20. Phased approach</td>
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<td></td>
<td>21. Knowledge management Capabilities</td>
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<td></td>
<td>22. Minimise customisation</td>
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<td></td>
<td>23. Managing vendor Relationships</td>
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<td></td>
<td>24. Troubleshooting &amp; technical support</td>
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<tr>
<td>Process and people factors</td>
<td>25. Setup business priorities</td>
<td>There should be a specified CRM process to acquire, retain and satisfy the organisations’ customers and help the organisation to be more customer-centric. Moreover, the setup of measurable metrics and goals is important to measure the success at the end. Process change and some time change among the people by removing or adding new roles and responsibilities to fit the solution are important. User awareness and training is one of CSFs that help to have smooth deployment and reduce resistance. Understanding customer requirements will maximise the benefit from a CRM solution. Furthermore, CRM champion and leaders is one of the important factors to overcome internal obstacles and politics and lead the required changes. Collaboration among employees and across project stakeholders is essential for successful CRM implementation. Benchmark may help to facilitate obstacles and minimise the customisation. Mitigate the risk of user resistance in early stage is vital.</td>
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<td>26. Setup measurable goals and metrics</td>
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<td>27. User awareness and training</td>
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<td>28. End user involvement</td>
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<td>29. Business needs</td>
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<td>30. Customer needs and involvement</td>
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<td></td>
<td>31. CRM champion</td>
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<td></td>
<td>32. Collaboration among project stakeholders</td>
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<td></td>
<td>33. Benchmark</td>
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<td></td>
<td>34. Customer segmentation</td>
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<td>35. Customer awareness</td>
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<td></td>
<td>36. Resistance to chance</td>
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Table 3-2: A Possible Taxonomy of CSFs in CRM Implementation Within the Developed Country
3.6 Conclusion

This chapter described the second part of the literature review. It discussed the previous studies on CSFs for CRM implementation. It attempted to explain the CSF concept. It provided an investigation and analyses of previous studies on CSFs and proposed taxonomy for them. The next chapter will describe the research methodology adopted by this research for the data collection procedure during fieldwork.
Chapter Four: Research Methodology

4.1 Introduction
The aim of this chapter is to describe the research methodology adopted by this research to investigate the CSFs and their interrelationships of CRM implementation within the private sector of the KSA. First, the chapter introduces the principal the research paradigms, namely, the positivist, interpretive and critical. Then it explains the research strategies, data collection methods and analysis methods. During this chapter, the researcher attempts to justify the selection of the appropriate research philosophy, strategy and method. The chapter provides a detailed explanation for the selected data collection and analysis method. It explains the research design for integrating case study with Grounded Theory. Finally, it offers criteria for evaluating the quality of the research.

4.2 Research Philosophy/Paradigms
Oates (2006, p. 282) defines paradigm as:

“A set of assumptions or ways of thinking about some aspects of the world.”

She also said:

“Different philosophical paradigms have different views about the nature of our world (ontology) and the ways we can acquire knowledge about it (epistemology).” (Oates 2006, p. 282)
The most common paradigms of Information Systems (IS) research are positivist, interpretive and critical paradigms (Orlikowski and Baroudi, 1991). The following sections provide a brief description of each of these paradigms.

### 4.2.1 Positivist

Positivism is an old paradigm and comes under the scientific method with the ultimate aim to specify generalisable laws that rely on the classification of statistical relationships between dependent and independent variables (McEvoy and Richards, 2006; Oates, 2006). Guo and Sheffield (2008, p. 3) defined the positivist research paradigm as:

“The discovery of universal laws that can be used to predict human activity and the physical and technological world.”

A recent definition by Neuman (2011, p. 95) view positivism as:

“An organised method for combining deductive logic with precise empirical observations of individual behaviour in order to discover and confirm a set of probabilistic causal laws that can be used to predict general patterns of human activity.”

In the positivist paradigm, reality is objectively gained and can be explained by many quantifiable variables that are free of researchers and their tools (Myers and Avison, 2002). IS research can be classified as positivist if there is:
"Evidence of formal propositions, quantifiable measures of variables, hypothesis testing and the drawing of inferences about a phenomenon from the sample to a stated population." (Orlikowski and Baroudi 1991, p. 5)

Positivist research paradigms are associated with many research strategies such as surveys and field experiments (Choudrie and Dwivedi, 2005; McEvoy and Richards, 2006). The main advantage of this paradigm is to eliminate possible sources of bias so that generalisations can be made from the sample to a wider population (Chen and Hirschheim, 2004; McEvoy and Richards, 2006). A second advantage is its high reliability as opposed to interpretive paradigm, since large samples are normally selected and are applied (Gable, 1994). The positivist paradigm, however, can be criticised when adopted within an IS context as follows:

(1) It neglects historical and contextual conditions as being the potential causes of events or effects on human action (Orlikowski and Baroudi, 1991).

(2) It ignores social contexts, such as culture and politics, that are embedded in the use of IT packages within the organisations (Orlikowski and Baroudi, 1991; Collis and Hussy, 2003).

(3) Positivism considers people as numbers by focusing on statistical methods and ignores people’s lives and actions (Neuman, 2006).

### 4.2.2 Interpretive

The interpretive paradigm has been defined as:
“The systematic analysis of socially meaningful action through the direct detailed observation of people in a natural setting in order to arrive at understanding and interpretation of how people create and maintain their social world.” (Neuman 2011, p. 102)

The assumption behind the interpretive paradigm is that knowledge and reality are only obtained through social construction, such as language (Klein and Myers, 1999). Guo and Sheffield (2008, p. 4) stated that the interpretive paradigm is concerned with:

“The social meaning of reality as explained by an individual or group.”

In addition, interpretive researchers have attempted to investigate the phenomena by assessing the meanings that participants allocate to it (Orlikowski and Baroudi, 1991; Myers and Avison, 2002). The interest in interpretive research has been raised by researchers (Klein and Myers, 1999) and it has become an important paradigm in IS (Walsham, 1995). In contrast to the positivist paradigm, social contexts, such as culture and politics are considered to play a major role in understanding phenomena (Orlikowski and Baroudi, 1991; Neuman, 2011). Walsham, said that the interpretive paradigm aims to generate,

“An understanding of the context of the information system and the process whereby the information system influences and is influenced by its context.” (1993, pp. 4-5)

The researchers of this paradigm claim that as the social world can be discovered in its natural human setting, it is inappropriate to apply statistical methods to explore the
Choudrie and Dwivedi (2005) point out that interpretive research is associated with many research strategies, such as case study, ethnography, Grounded Theory and participant observation.

As with other paradigms, the interpretive one is subject to criticism as follows:

1. Generalisations can be obtained only to the context and not to a wider population.
2. It ignores historical changes over time (Orlikowski and Baroudi, 1991).

### 4.2.3 Critical

The critical paradigm is a comparatively recent addition to the IS domain. It provides an alternative to the more conventional positivism and interpretive paradigms (McEvoy and Richards, 2006). It is associated with research strategies, such as action research (Choudrie and Dwivedi, 2005). In addition, a fundamental distinction of the critical research philosophy is its evaluative dimension, which assists the researcher to assess critically and change the social reality under study (Orlikowski and Baroudi, 1991).

Critical research does not only attempt to understand and explain some situations, but also focuses upon relationships, conflicts and contradictions in order to eliminate them (Myers, 1997; Oates, 2006). Klein and Myers point out that IS research can be categorised as critical if:

“The main task is seen as being one of social critique, whereby the restrictive and alienating conditions of the status quo are brought to light.” (1999, p. 69)
Chapter Four

In the critical paradigm, the researchers take for granted that participants are willing to take action to enhance the effectiveness of their work (Klein and Myers, 1999; Stahl, 2008; Myers and Klein, 2011). The main variation between the interpretive and critical paradigm is that the latter goes beyond understanding the phenomenon in their natural setting to criticise and change it (Khazanchi and Munkvold, 2003; Neuman, 2011). Recently, IS researchers have changed their treatment with respect to technology from negative to fairness and reasonable treatments by viewing both its positive and negative aspects (Myers and Klein, 2011). The main criticism, however, of critical research is that less power might be given to the researcher from the examined organisation than required, which may affect the level of emancipation and transformation possible (McLean and Stahl, 2007).

4.2.4 Selection of Paradigm for This Research

Paradigms vary with respect to their view of reality and to the way that the required knowledge is gained. It is, therefore, very important to select the appropriate paradigm that is able to address the main research questions. In addition, researchers should assure the selected paradigm is appropriate with regard to their own research interests, directions and assumptions (Orlikowski and Baroudi, 1991).

The interpretive paradigm is the most appropriate one to adopt for this research for the following reasons. The interpretive paradigm is more suitable if the researcher is studying or exploring people in their natural social settings (Orlikowski and Baroudi, 1991). This paradigm aims to capture knowledge by understanding human and social interactions and not through hypothetical deduction (Walsham, 1995). The research is
attempting to explore perceptions within organisations regarding CSFs. In addition, the paradigm will identify common themes between organisations rather than attempting to prove a hypotheses or generalising anything beyond the KSA. Moreover, the interpretive paradigm views reality and knowledge as socially created and constructed, and the research aim is to identify the CSFs for CRM implementation within the KSA, by exploring the participants’ (customer and organisational employees) views and perceptions in their nature setting. As stated earlier by Walsham, interpretive research aims to generate:

“An understanding of the context of the IS and the process whereby the IS influences and is influenced by its context.” (1993, pp.4-5)

This paradigm assists IS researchers to explore human thinking and act in social and organisational contexts (Klein and Myers, 1999). Furthermore the paradigm has the ability to provide in-depth understandings of IS development (Klein and Myers, 1999). By contrast, Oates (2006) states that the positivist paradigm is useful if the researcher is trying to prove theories to test a hypothesis or to look for generalisations. In addition, the researcher will be able to identify common themes between organisations while trying neither to prove a hypotheses nor generalising anything beyond KSA. On the other hand, the critical paradigm is more appropriate if the researcher goes beyond understanding and exploring the phenomena to challenge and critique people for their work (Oates, 2006). The researcher, however, will not be able to challenge, critique or impose on people within the organisations.
Having identified the interpretive paradigm as the one adopted for this research, it is important to move to the next stage to consider the various research strategies and select the appropriate one for this research.

4.3 Research Strategy

Research strategy is defined as:

"A general plan of how the researcher will go about answering the research questions."

(Saunders et al. 2003, p. 90)

It is a general approach to address a specific enquiry (Robson, 2002). Most research is classified as either qualitative or quantitative and the two are associated with various research strategies based on this classification (Myers and Avison, 2002; Creswell, 2003; Yates, 2004; Bryman, 2008). For instance, the survey and experimental strategies are commonly associated with quantitative research, whilst the case study, action research and ethnography strategies are normally associated with qualitative research (Myers and Avison, 2002; Creswell, 2003; Yates, 2004; Bryman, 2008). Layder (1993), however, has criticised this distinction because:

1. Most strategies are capable of generating both qualitative and quantitative data.
2. Qualitative research can be conducted using quantitative methods and vice-versa.
3. Some researchers integrate qualitative and quantitative methodologies.

Oates (2006), in her book “Researching Information Systems and Computing” avoided classifying strategies as qualitative and quantitative research: she used the two terms only to classify data analysis methods rather than the overall strategy. Remenyi (2012)
confirmed that some researchers disagree about splitting research into qualitative and quantitative, and link the distinction only to the data analysis method that is employed.

There are ten research strategies mentioned within the IS literature, namely case study, Grounded Theory, action research, experiments, content analysis, ethnography, design and creation, phenomenology, surveys and historical research (Burns, 2000; Blaxter et al., 2001; Leedy and Ormrod, 2001; Robson, 2002; Oates, 2006; Denscombe, 2007). Oates (2006) recommends six research strategies within her chapters: surveys, experiments, ethnography, action research, design and creation, and case study. Although, not one of the six strategies, Oates (2006) acknowledges that Grounded Theory, more than data collection and has been used for much research within IS field. In addition, researchers such as Denscombe (2007) consider Grounded Theory to be a research strategy that has been applied by researchers such as Orlikowski (1993), Howcroft and Hughes (1999), Urquhart (2001), Lundell and Lings (2003) Bryant et al. (2004). The researcher, therefore, decided to look at all six recommended strategies and Grounded Theory to select the most appropriate one for the current research. In the following sections, the different research strategies will be outlined.

4.3.1 Grounded Theory Research Strategy

The term ‘Grounded Theory’ was first created by Strauss and Glaser in 1967 (Carvalho et al., 2005). Since then, many researchers including IS ones have used this theory as a research strategy (Orlikowski, 1993; Urquhart, 1997; Urquhart, 2001; Fernández et al., 2002; Allan, 2003; Linden and Cybulski, 2003; Sorrentino and Virili, 2005; Hansen and
Kautz, 2005; Coleman and O'Connor, 2007; Andrade, 2009; Urquhart et al., 2010).

Martin and Turner (1986) defined Grounded Theory when they said:

“An inductive, theory discovery methodology that allows the researcher to develop a theoretical account of the general features of a topic while simultaneously grounding the account in empirical observations or data.”

This definition implies that the main purpose for applying Grounded Theory is to devise a theory based upon analysing data (Glaser and Strauss, 1967; Strauss and Corbin, 1990). It is referred to as an inductive approach; the expectation is that data findings lead to a theory (Strauss and Corbin, 1990; Orlikowski, 1993; Heath and Cowley, 2004; Charmaz, 2006; Urquhart et al., 2010).

Leedy and Ormrod (2001) pointed out that data should be collected in the field rather than acquired from a literature review. Strauss and Corbin (1990) suggested that the researcher should conduct literature review before data collection.

There are some disadvantages of using Grounded Theory as a research strategy, for example, the difficulty in predicting the sample to be used during the study and that the process of data analysis is complex (Denscombe, 2007).

4.3.2 Survey Research Strategy

Many researchers collect data in a structured format from a group of participants or organisations using a survey strategy. This form of data collection and is typically associated with positivist research and is widely used. It involves one or more data
collection methods, such as questionnaires and interviews (Robson, 2002; David and Sutton, 2004; Denscombe, 2007). The main aim of a survey is to explore and establish a common relationship across a group of participants. From this, the researcher is able to construct a generalised statement about the phenomena (Denscombe, 2007). Questionnaires and structured interview methods are commonly used within survey strategies (Bryman, 2008). There is some disadvantages in using the survey as a research strategy, Such as the risk of a low rate of response and the quality of collected data. In addition, since it should not take a long time to respond to a survey, the method is not suited to in-depth questions (Gable, 1994; Denscombe, 2007).

4.3.3 Experimental Research Strategy

Experimental Research is defined as:

“A strategy that investigates cause and effect relationships, seeking to prove or disprove a causal link between a factor and an observed outcome.” (Oates, 2006, p. 127)

Experimental Research is normally used to prove or disprove hypothesis (Oates, 2006, p. 127). Experimental Research is conducted mainly in the laboratory, which helps the researcher to measure the impact of one variable on another, and is normally used within the natural sciences (Robson, 2002). Its aim is to observe and measure the attitudes of participants rather than interview them (Yates, 2004). Experimental Research is often used to compare one or two conditions. The process, however, might take a long time and become complicated (Yates, 2004). The process might not
represent the real environment (Collis and Hussy, 2003) and it is difficult to control all
the variables that might affect the outcome (Denscombe, 2007).

4.3.4 Ethnography Research Strategy

The word ‘ethnography’ is used to describe human behaviour and culture (Punch, 2005; Denscombe, 2007). Ethnography Research is a strategy in which the researcher uses observation methods to explore the pattern of human activities (Punch, 2005). It offers direct observation and potentially comprehensive data by spending a long time immersed in the field (Myers and Avison, 2002; Collis and Hussy, 2003; Oates, 2006; Denscombe, 2007; Bryman, 2008). Indeed, ethnography looks for a holistic view, which comprises the process, the connection, interrelationships and interdependency among the aspects of the issue (Denscombe, 2007). Self-awareness and validity are most likely to be achieved for ethnography researchers as they devote much time to fieldwork (Denscombe, 2007). Ethnography Research, however, is subject to some criticisms, such as:

(1) It is difficult to gain access for long periods in the field (Punch, 2005; Bryman, 2008).
(2) Generalisations might be difficult to obtain since this mode of research produces an in-depth study rather than a wider one (Bryman, 2008).
(3) The researcher needs to dedicate more effort and time to study, analyse and extract the findings (Myers, 1999).
4.3.5 Action Research Strategy

Action Research is a strategy, which allows practitioners to examine and improve their own working practices (Baskerville and Wood-Harper, 1996; Oates, 2006). It is intended to solve existing problems in the professional environment (Collis and Hussy, 2003). Collaboration is needed between the researcher and members of the field of work under investigation in order to identify the problem and provide the solution (Bryman, 2008). The disadvantages of this strategy include the requirement that professionals participate, which can limit the scale of the research and a conflict of interest between the researcher and his ‘sponsor’ that will make it difficult to meet the needs and expectation of everyone. Generalisation becomes another issue, as it may not always be possible (Oates, 2006; Denscombe, 2007). In addition, the strategy has been criticised as being too pragmatic by aiming to identify the problem and solve it in the field rather than building theories and knowledge as an academic contribution (Punch, 2005; Bryman, 2008; Robson, 2011).

4.3.6 Design and Creation Research Strategy

Design and creation is a research strategy used by IS researchers to design and develop IT solutions to test, validate, investigate, analyses, or explain a phenomena; and this is normally termed ‘artefact’ (Oates, 2006). This strategy can be used to develop IT applications for different purposes (Oates, 2006) as following:

(1) Develop an application to derive studies conducted in literature or/and fieldwork.

(2) Develop an application and examine the impact of applying it within a social context.
(3) Develop an application by using different software programs with the aim of evaluating and comparing the differences between the two software programs.

(4) Develop an application to explain and justify the results within the literature or/and the fieldwork.

(5) Develop an application with the aim to investigate the use of a specific development method.

(6) Analyses existing development approaches with the aim to develop a better approach that can overcome the weaknesses of existing ones.

(7) Apply two or more development methods in order to perform comparison and evaluation between them.

However, Design and Creation Research, is subject to some criticisms, such as:

(1) Needs a strong argument to prove the originality of the work.

(2) Needs technical skills such as programming language or software tools.

(3) It is suitable for IT development solutions.

(4) It is difficult to generalise to different settings.

4.3.7 Case Study Research Strategy

Case studies are used by many IS researchers to provide an in-depth examination for their research problems (Orlikowski and Baroudi, 1991; Gable, 1994; Walsham, 1995; Denscombe, 2007; Yin, 2009). Yin (2009, p. 18) defines a case study as:
“An empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident.”

In the Case Study strategy, phenomena are examined in a social setting (Benbasat et al., 1987). This strategy is used by different researchers to contribute to the body of knowledge about individuals, groups, organisations, political and social groupings (Yin, 2009). In addition, the strategy improves the validity of the data that is collected by having multiple sources within an organisation (Yin, 2009). The strategy is useful to investigate new phenomena in their real context and it can be used for either positivist or interpretive paradigms (Benbasat et al., 1987; Walsham, 1995; Yin, 2009). Blaxter et al. (2001) stated that case studies are suitable for small-scale research including single or multiple cases. In addition, the case study could be about an individual, a group, an organisation or a project (Hunter, 2004; Yin, 2009). Moreover, the Case Study strategy helps researchers to answer 'how' and 'why' questions (Benbasat et al., 1987; Yin, 2009). It can be used either to test or build a theory (Darke et al., 1998; Yin, 2009) and sometimes the research question shifts from theory testing to theory building during the research (Eisenhardt, 1989).

Case Study strategy has some claimed disadvantages, such as the lack of accessibility and the availability of the right case study, and the lack of generalisation (Lee, 1989; Gable, 1994; Denscombe, 2007). Case studies, however, tend to generalise to the context (Walsham, 1995). The generalisation is aimed to extend and generate concepts and theory (Walsham, 1995). That is:
“analytical generalisation rather than statistical generalisation.” (Yin, 2009)

Finally, the weakness of a systematic method for analysing the data that can lead to building a theory (Darke et al., 1998; Halaweh et al., 2008; Andrade, 2009). A few studies, however, performed by Lehmann (2001b), Fernández (2004), Halaweh et al. (2008), Andrade (2009) and Fernández and Lehmann (2011) revealed that Grounded Theory can integrate with Case Study to fulfil the lack of a systematic method for data analysis (cf. Section 4.4). As the Case Study will be used in combination with Grounded Theory (cf. Section 4.4), the next Section discusses the design of the Case Study strategy.

4.3.7.1 Design of the Case Study Strategy

The main purpose of Case Study design is to help the researcher to identify enough evidence to address the research questions (Yin, 2009). Research design is defined as:

"the logical sequence that connects the empirical data to a study's initial research questions and, ultimately, to its conclusions." (Yin 2009, p. 26)

Yin suggests five important aspects for case study design:

“a study’s questions, propositions, units of analysis, the logic linking the data to the propositions and the criteria for interpreting the findings.” (2009, p. 27)
Questions that start with ‘how’ and ‘why’ are necessary in order to obtain an in-depth exploration of the phenomena (Benbasat et al., 1987; Yin, 2009). The research propositions emerge from literature and they are used to identify the types of information that need to be collected (Yin, 2009).

Units of analyses are used to identify the boundary of the phenomena and it is the main advantage that brings many researchers to apply case study strategies (Andrade, 2009; Yin, 2009). The units of analysis define “what the case is” (Yin 2009, p. 29). The units of analysis could be at individual, group or organisational level (Benbasat et al., 1987; Yin, 2009).

Case Study Strategy can involve single case or multiple cases (Yin, 2009). According to Yin (2009, p. 47), there are five reasons to select a single case:

(1) The case represents a critical case for testing a well-formulated theory.
(2) The case is unique or rare.
(3) The case is typical, such as a project similar to other ones.
(4) The case is revealing i.e. the researcher wants to study previously inaccessible cases.
(5) The case is longitudinal i.e. the same case can be studied over different periods.

Multiple case studies are increasingly being used. Their findings and results have proven more exciting and healthy compared to single case studies as it involve more participants from different places (Herriott and Firestone, 1983; Yin, 2009).
Case study preparation is important before starting the fieldwork. Yin (2009) has suggested that four aspects should be considered before commencing any fieldwork; training for a specific case study, developing the case study protocol, screening candidate cases and conducting a pilot study. A case study protocol is defined as:

“a major way of increasing the reliability of case study research to guide the investigator in carrying out the data collection from single case [or multiple cases]” (Yin 2009, p. 79)

The protocol should include the following:

1. An overview of the case study project, i.e. the case study’s objectives, issues and topics being investigated as it is important to provide the reader with the background to the topic and the purpose of the case study.

2. Field procedures i.e. authorisation is necessary to access case study sites and sources of information. It is important to identify the interviewees and access them in order to conduct the interviews. In addition, the researcher will need to acquire certain resources, such as a personal computer, paper, a place, a tape recorder and the interview’s schedule.

3. Case study questions need to be included in order to identify initial questions and keep the investigator on track during the data collection process. The questions that are prepared in the case study protocol form the starting point for the interviews, rather than being the final actual questions, asked of respondents (Yin, 2009).
(4) A guide of the case study’s protocols i.e. outlines and formats for presenting the findings of the case study need to be included.

**Pilot Study**

Yin stated that a pilot case study will help the researcher “to refine ... data collection plans with respect to both the content of the data and the procedures to be followed” (2009, p. 92). As aforementioned earlier in this section that conducting pilot study is necessary before the start of the actual fieldwork. It helps the researcher to refine the plan of data collection including time, location, questions type of the interviews (Yin, 2009).

### 4.4 The Justification for Selected Research Strategy and Design

The choice of research strategy and its methods depends on a number of considerations, such as its research questions, aims and time (Sekaran, 2003). In order to address different aspects of a research problem, the researchers should be ready to draw on more than one research strategy (Remenyi *et al.*, 1998). Many researchers have used different methods or strategies to study the same problem in order to achieve a greater degree of validity, reliability, improved accuracy, obtain a complete picture and to compensate strengths and weakness (Kaplan and Duchon, 1988; Collis and Hussy, 2003; Rao and Woolcock, 2003; Denscombe, 2007).

According to Eisenhardt (1989), building a theory based on case data has three strengths:

(1) There is the possibility of generating novel theory.
(2) As the theory is constructed based on data, it is most likely to be tested by other data.

(3) The extracted theory is most probably empirically valid.

Lehmann (2001a, p. 87) said that:

“applying grounded theory to case study was very successful. It produced a prolific amount and yielded a great richness of information … The case settings, furthermore, contained more varied data than could be expected from individual, purely homocentric studies. Efficiency and abundance combined to make this method an exceedingly fruitful one.”

Fernández et al. claimed that Grounded Theory can be used as an “overarching methodology that accepts data from case studies as key building blocks but is not limited or governed by traditional case study methodology” (2002, p. 114). Fernández (2004) emphasised that the researcher must clearly state which strategy is driving the research. Hughes and Jones (2003) point out that both case study and Grounded Theory are consistent and both can be used to examine social and organisational contexts. The use of this approach was justified by Halaweh et al. (2008) when they applied a Straussian approach (cf. Section 4.7.1.2) to Grounded Theory. This approach and case is similar to case study because it involves a review of the literature about the phenomena before the fieldwork starts. Later, Andrade (2009) present guidelines that can be used for integrating Grounded Theory and case study as a research strategy without stating what approach to Grounded Theory had been applied.
In summary, several studies revealed the applicability and benefits of combining case study with Grounded Theory, such as a strength of boundary in case studies (Andrade, 2009) and a systematic method for data collection and analysis in Grounded Theory (Fernández, 2004, Halaweh et al., 2008; Andrade, 2009; Fernández and Lehmann, 2011) (cf. Section 4.3.7).

Fernández, (2004) pointed out that the reasons for applying Grounded Theory are compatible with the ones for applying case study that were proposed by Benbasat (1987).

The research strategy for this research will be a combination of Grounded Theory and case study i.e. Grounded Theory will be used as an overarching strategy to study data derived from a case study. In addition, it is anticipate that this combination will drive the data collection activities within and outside the case study. In the next remaining paragraphs of this section, justifications for selecting this kind research strategy are presented.

As mentioned in Sections 1.2 and 1.3, the researcher wanted to investigate and acquire an insight into a new topic, namely, the CSFs for successful CRM implementation and within the KSA to acquire information about the “what”, “why” and “how”. Case study strategy and Grounded Theory are valuable when knowledge about a new area is limited (Shields and Twycross, 2003; Fernández, 2004; Yin, 2009) and to address the sort of questions that lead to an understanding of the phenomena, such as “why” and “how” (Benbasat et al., 1987; Fernández, 2004; Yin, 2009) (cf. Section 4.3.7). Case study strategy is suitable when the investigation is conducted within its real life context
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(Benbasat et al., 1987; Fernández, 2004) (cf. Section 4.3.7). In this research, the researcher will carry out the investigation of organisations within the private sector of the KSA to identify the CSFs and the interrelationships of CRM implementation in its natural context. Case study and Grounded Theory strategies help the researcher to enrich the inquiry by exploring phenomena in depth and so provide insight into people's actions and behaviour, which allowed new emerged issues (CSFs of CRM) to be discovered. As mentioned in Section 4.3.7.1, one of the advantages of case study is its ability to determine the boundaries of phenomena. In this research, the unit of analysis are the organisations within the private sector of the KSA. Case studies are used by many IS researchers to provide in-depth analysis for their research problems (Orlikowski and Baroudi, 1991; Gable, 1994; Walsham, 1995; Denscombe, 2007; Yin, 2009). As mentioned in Section 4.3.7, case study suffers from a weakness in terms of its ability to act as a systematic method for analysing the data for building a theory (Darke et al., 1998; Halaweh et al., 2008; Andrade, 2009). In contrast Grounded Theory provides rigorous detailed procedures for data collection and analysis (Lehmann, 2001a; Fernández, 2004; Halaweh et al., 2008; Andrade, 2009; Fernández and Lehmann, 2011). Grounded Theory is an inductive approach where data leads to build a theory (Strauss and Corbin, 1990; Orlikowski, 1993; Charmaz, 2006). It assists in identifying concepts and categories, and their interrelationships that emerge from the data (Corbin and Strauss, 2008). This research seeks to develop a model composed of CSFs for CRM and their interrelationship in order to support the effective implementation of the latter within the private sector of the KSA. Thus, case study design and Grounded Theory, particularly Straussian approach (cf. Section 4.7.1.2) can be combined to complement each other in interpretive research to build a theory (Andrade, 2009).
In essence, there is a several matching characteristics between the case study strategy and the Straussian approach to Grounded Theory, as detailed below:

(1) As explained earlier in this section both case study and the Straussian approach to Grounded Theory start by reviewing the literature before fieldwork begins. This should not prevent the researcher from collecting data and analysing it, thereby being an interpretivist and open minded for all the concepts that emerge from the fieldwork.

(2) Both case study and Grounded Theory use interviews as the main source and technique for data gathering (Walsham, 1995; Allan, 2003; Corbin and Strauss 2008; Yin 2009)

(3) Boundary and the scope of the research is the main advantage of the case study (Andrade, 2009). This consistent with theoretical sampling in Grounded Theory to identify the boundary of the research (Strauss and Corbin, 1990; Halaweh et al., 2008)

(4) Generalisation for both case study and Grounded Theory is similar. Both approaches aim to generalise the result to the context rather than the wider population (Strauss and Corbin 1990; Walsham, 1995; Halaweh et al., 2008; Yin, 2009) (cf. Section 4.3.7).

The remaining discussion in this section highlights why the other research strategies in Section 4.3 are discounted.

**Survey Research Strategy**

The survey strategy is a good option when the phenomena have been previously examined (cf. Section 4.3.2): a survey strategy can only provide answers to questions that are predefined by the researcher from the literature. As the aim of this research is to
achieve an in-depth exploration rather than to quantify the problem, a survey strategy does not allow detailed questions and answers to explain the problem (Gable, 1994; Denscombe, 2007). In addition Choudrie and Dwivedi (2005) argue that, in contrast with the case study strategy, the survey strategy is the most suitable method for examining the adoption of technology at an individual level while the case studies the more relevant to the organisational level.

**Experimental Research Strategy**

As mentioned in Section 4.3.3, experimental research is usually conducted in the laboratory. Since this research will be conducted in the field, that is, within private sector organisations in the KSA, this strategy is not a suitable choice.

**Action Research Strategy**

Although the researcher has experience within the industry, the current research objectives cannot be met by using this type of strategy. In addition, one of the requirements to apply action research is that the problem under investigation should exist within the organisation, which is not the case with some of the samples, since their CRM implementation project has been completed. In addition, the researcher has to be able to follow the problem and act on it, which is not possible within the samples of this research.

**Ethnography Research Strategy**

As mention in Section 4.3.4 ethnography research requires the researchers to spend a long time immersing themselves within organisations in order to observe the human
activities from inside. Since the main objective of this research is to explore CSFs that affect CRM implementations within the private sector of the KSA, the researcher would need an inordinate amount of time to investigate the proposed number of organisations if ethnography research were to be used for this research.

**Design and Creation Research Strategy**

As mentioned in Section 4.3.6, a design and creation strategy is appropriate for IT software development, which requires the researcher to have technical programming language skills and experience. It is a good option if the researcher is looking to evaluate, test or validate a phenomena. Since the main objective of this research is to explore CSFs that affect CRM implementations within the private sector of the KSA, the researcher would need to investigate the phenomena in its human natural setting.

### 4.5 Data Collection Methods

After identifying the most appropriate research strategy for this research, it is very important to decide how the data will be collected (Robson, 2002). In a case study strategy and Grounded Theory combination, many methods can be used, such as interview, participant observation, documentary analysis, focus group, and even a questionnaire (Sekaran, 2003; Oates, 2006; Birk and Mills, 2011). In the following sections, different data collection techniques will be explained.

#### 4.5.1 Interview

An interview is a powerful data collection method, which is used to record discussions between the researcher and participants (Marshall and Rossman, 1999). Blaxter *et al.*
(2001) stated that interviews can take place at home, on the street, at work, by email or by phone.

There are three types of research interview (Marshall and Rossman, 1999; Burns, 2000; Denscombe, 2007):

1. Structured interviews: the researcher uses standardised questions for each participant. It is useful when there are a large number of interviewees. In addition, it is usually used in survey research to collect data, which will be analysed by quantitative data analysis methods (Bryman and Bell, 2003; Bryman, 2008).

2. Semi-structured interviews: the researcher has the flexibility to use non-standardised questions, however this should be within a limited informal discussion for the subject then lends the interviewee more flexibility to develop their ideas.

3. Unstructured interviews: the researcher uses informal discussion by introducing the topic and then allowing the interviewee to cover it in his/her own way.

Both unstructured and semi-structured interviews are regularly applied in case study research to collect the data, which is then analysed by qualitative data analysis methods (Saunders et al., 2003). According to Denscombe (2007), obtaining the required approval for the interview and arranging the meeting’s agenda, time and location are the responsibilities of the researcher before the interview.

There are several advantages for using the interview data collection method; these include high response rate, opportunity for exploration confirmation, flexibility, in-depth understanding of the phenomena, and allowing the probing by the interviewer.
(Tashakkori and Teddlie, 2003; Neuman, 2004). In contrast, there are some disadvantages to using interviews; these include the fact that an interview can be very time consuming, costly, may have interruptions and interviewer bias (Robson, 2002; Tashakkori and Teddlie, 2003).

### 4.5.2 Questionnaires

The questionnaire is usually associated with the survey research strategy (Denscombe, 2003). The main purpose of the questionnaire is to gather data that is not easily available in the literature (Remenyi et al., 1998). According to Gillham (2000) there are various advantages for using a questionnaire in the research, for example, it saves time and money, the researcher can access a large number of individuals or groups, it is easy to analyse the data via systematic methods and there is a lack of interviewer bias. There are, however, some disadvantages related to using the questionnaire; the questions need to be brief and simple, it is impossible to validate the answers, questions can be unclear, there may be missing data and a low response rate (Gillham, 2000; Sekaran, 2003; Neuman, 2004; Denscombe, 2007).

### 4.5.3 Participant Observation

Participant observation has been defined as the:

“process of gathering open-ended, first hand information by observing people and places at a research site.” (Creswell 2005, p. 211)
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It allows the researcher to participate in the field as an observer for a certain period (Saunders et al., 2003). This method, however, requires time to be spent in the field, can cause difficult ethical problems for the researcher, and can lead to significant observer bias. Moreover, it focuses on what happens (not why it happens), and it is difficult to repeat the study to check its reliability (Denscombe, 2007).

4.5.4 Documentary Analysis

Documentary analysis is another important method used for data collection. Documents contain all the information and data that relate to the study, and can be accessed or obtained from different sources by the researcher, such as minutes of meetings, policy and strategy documents, guidelines, letters, manuals, reports, web pages, and any other useful documents (Marshall and Rossman, 2006). Such documents and resources help to develop an understanding of the phenomena that are being studied. In addition, one of the advantages of documents is that they are usually ready for analysis (Creswell, 2005). There is some disadvantages in using documents, such as their availability and accessibility (Creswell, 2005; Bryman, 2008).

4.5.5 Focus Group

The focus group is a data collection method whereby the researcher invites a group of people to interact with a specific research problem (Yates, 2004). By including a variety of participants, different views can be gathered in less time than would be needed for individual interviews (Bryman, 2008). Arrangements and scheduling, however, could be difficult since different people need inviting at the same time, as could also be the organising and controlling the meeting (Bryman, 2008).
4.6 The Justification for Selected Data Collection Methods

In this research, the semi-structured interview was used as the main method to collect the data for the following reasons:

- As the main aim of the research is to identify the CSFs and their interrelationships for CRM implementation, the semi-structured interview enables the researcher to obtain a store of rich data via an in-depth investigation that is required for such a complex phenomenon (Rubin and Rubin, 2005). In addition, this mode of interview allows the researcher to pose more questions and receive detailed answers (Strauss and Corbin, 1998).

- Interview techniques are used by many researchers for case study and Grounded Theory strategies (Yin, 2009; Birk and Mills, 2011).

- By using an interview, the researcher is most likely to obtain a high response rate as well as the opportunity to explore any new emerged results, and to obtain clarification and confirmation for the findings (Strauss and Corbin, 1998; Tashakkori and Teddlie, 2003; Neuman, 2004) (cf. Section 4.5.1).

Document analysis will be used as a secondary source, including documents, reports, websites and any valuable materials that help in answering the main research question, where available and accessible to the researcher.

The other data collection methods described in Section 4.5 were discounted for the following reasons.
Questionnaires

As mentioned in Section 4.5.2, the questionnaire is usually associated with the survey research strategy (Denscombe, 2003). In Grounded Theory, questions need to be gradually updated and emerged from each other over a period as part of theoretical sampling (cf. Section 4.7.1.1) to achieve in-depth exploration. This will be difficult to achieve with questionnaires. Moreover, it is difficult to validate the answers, there may be missing data, and low response rate (Gillham, 2000; Sekaran, 2003; Neuman, 2004; Denscombe, 2007).

Participant Observation

Participant observation is a good option to use when the researcher looks to answer the questions ‘what happens’ rather than ‘why it happens’ and ‘how it happens’ (Denscombe, 2007). Furthermore, it is difficult to repeat the study to check reliability (Denscombe, 2007).

Focus groups

As the unit of analysis is organisations, it is difficult to gather people at the same time. Each organisation has different rules and times. Participants may feel inhibited to speak about an issue in front of group people (Morgan, 1996). Arrangements and scheduling could be difficult since different people need to be invited at the same time as well as organising and controlling the meeting (Bryman, 2008). Thus, this type of data collection method has been discounted for this research.
4.7 Data Analysis Methods

According to Kent (2001), data analysis takes place after the data has been collected with the ultimate aim of processing it in order to generate information that can be used to achieve the research’s objectives. Grounded Theory will be used to analyse the qualitative data owing to the lack of a systematic method for analysing data in the case study (Darke et al., 1998; Halaweh et al., 2008; Andrade, 2009). The nature of Grounded Theory is explained in detail in the following section.

4.7.1 Grounded Theory Approaches

Strauss and Corbin (1990, p. 24) defined Grounded Theory as:

“A qualitative research method that uses a systematic set of procedures to develop an inductively derived grounded theory about a phenomenon.”

There is a dynamic relationship between data analysis and data collection, i.e. the researcher does not have to wait until all the data is collected to begin the analysis. It has been suggested that the researcher should have “an open mind [and] not an empty head” (Dey 1993, p. 229). The method provides procedures for data analysis and allows the emergence of creative and valuable findings that are grounded in the data, which offers the researcher the opportunity to build a theory (Orlikowski, 1993; Urquhart et al., 2010). Glaser and Strauss (1967), described as the first version of the Grounded Theory. In this version, Grounded Theory aimed to build theory starting with the collection of data from fieldwork without first reviewing the relevant literature. Later and specifically in 1990, Grounded Theory was extended by allowing the literature to
be reviewed before data collection. This may be described as the second or Straussian
version (cf. Section 4.7.1.2) of the theory (Strauss and Corbin, 1990; Strauss and Corbin
new coding process with a strong emphasis on conditions, context, interaction strategies
and consequences” (Goulding 2002, p. 158). Researchers, such as Orlikowski (1993),
Galal and McDonnel (1997), Lubbe and Remenyi (1999), Lehmann (2001b), and
Rowlands (2005) have applied Grounded Theory without stating what approach they
followed (Hekkala, 2007). Researchers must understand the differences between the two
approaches in order to decide which one is more appropriate for their research (Kendall,
1999; Urquhart et al., 2010).

The debate between the co-founders of Grounded Theory began publically following
the publication of Strauss and Corbin’s book in 1990 (Kendall, 1999; Urquhart, 2001;
Heath and Cowley, 2004). The main differences between the co-founders fall within
two areas.

1. The role of literature in Grounded Theory

Glaser argued that data should emerge naturally rather than forced from the relevant
literature (Urquhart, 2001). Glaser (1992) emphasised that the literature should not be
reviewed before conducting the study in order to avoid the imposition of theories
derived from these sources onto the data. He stated explicitly that the researcher “need
not to review any of the literature in the substantive area under study” (Glaser 1992, p.
31). Thus, the literature is considered only after completion of the fieldwork and once
the substantive theory has been established (Urquhart, 2001). Glaser (1992) supposed
that the research problem and questions are not needed to conduct the fieldwork. He said:

“The research question in a Grounded Theory study is not a statement that identifies the phenomenon to be studied.” (p. 25)

In contrast, Strauss and Corbin (1990) accepted that there should be some review of the literature before data collection begins. This review should help to form the initial questions for the fieldwork. They said:

“The research question in a grounded theory... tells you what you specifically want to focus on and what you want to know about this subject.” (Strauss and Corbin 1990, p. 38)

2. The coding paradigm model

The coding paradigm model proposed by Strauss and Corbin (1990) has been criticised by Glaser (2002) who argued that it forces the concept, rather than letting it emerge from the data. Kendall (1999) stated that the main issue with the paradigm is the separation of axial and open coding (see Section 4.7.1.2), which prevents the data emerging continuously in order to achieve theoretical saturation (cf. Section 4.7.1.1). Strauss and Corbin (1998), however, made it clear that open and axial coding in fact continue hand in hand to allow data to emerge. They said:
“In axial coding, as in open coding, the analyst continues to ask all types of generative questions, makes constant and theoretical comparisons.” (p. 137)

They confirmed, in the 3rd edition (Corbin and Strauss, 2008), that “open coding and axial coding go hand in hand [and] the distinction made between the two types of coding are for explanatory purposes only.” (p. 198)

4.7.1.1 Aspects Used in Grounded Theory

Before starting to explain the coding paradigm (Straussian version) that will be applied to this research (cf. Section 4.7.1.2), it is important to give a brief description of some of the important aspects that are used in Grounded Theory.

Constant Comparison

Constant comparison can be described as the heart of grounded theory strategy (Charmaz, 2006). Urquhart et al. defined it when they said:

“The process of constantly comparing instances of data labelled as a particular category with other instances of data in the same category.” (2010, p. 369)

The main aim of constant comparison is to reach data and theoretical saturation by revealing the analytic properties (attributes of the concept or category) and dimensions (location of properties along a continuum) of the codes and categories so making them more theoretical (Strauss, 1987; Glaser, 1992; Charmaz, 2006; Urquhart et al., 2010).
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Theoretical Sampling

Theoretical sampling is:

“The process of data collection for generating theory whereby the analyst jointly collects, codes, and analyses his data and decides what data to collect next and where to find them, in order to develop his theory as it emerges.” (Glaser and Strauss 1967, p. 45)

It helps the researcher to identify the next sample, such as people, places, events or questions to ask, based on the concepts that emerged from previous interviews (Glaser and Strauss, 1967; Corbin and Strauss, 2008; Urquhart et al., 2010).

Theoretical Sensitivity

Theoretical sensitivity is the ability of the researcher to conceptualise and formulate a theory as it emerges from the data (Glaser and Strauss, 1967; Corbin and Strauss, 2008; Urquhart et al., 2010). This sensitivity can emanate from literature, existing theories or experience of the subject under investigation (Glaser, 1978; Urquhart, 2001; Corbin and Strauss, 2008).

Theoretical Saturation:

Strauss and Corbin defined theoretical saturation when they said:

“The point in category development at which no new properties, dimensions or relationships emerge during analysis.” (1998, p. 143)
The researcher continues the interplay between data collection and analysis until reaching the point at which no new data emerges. This means that the data is theoretically saturated. Now, the researcher can stop gathering data because, during analysis, no new properties and dimensions emerge (Corbin and Strauss, 2008).

**Theoretical Integration**

Theoretical integration means:

“Relating the theory to other theories in the same or similar field.” (Urquhart *et al.* 2010, p. 369)

It is the process of comparing the generated substantive theory with previously developed ones with the aim of scaling up the findings and achieving theoretical explanation (Urquhart *et al.*, 2010; Birks and Mills, 2011). Meta-theories, such as structuration theory (Glaser, 1978; Orlikowski and Robey, 1991; Walsham, 2002) or Institutional Theory (Scott, 2008), offer a useful theoretical lens for providing broader explanation.

**Theoretical Memos**

Glaser defined memos as:

“The theorizing write-up of ideas about codes and their relationships as they strike the analyst while coding.” (1978, p. 83)
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Research Methodology

It allows the researcher to focus on generating ideas creatively, and frees him from the restriction of writing in an elegant style (Urquhart, 2001).

**Iterative Conceptualisation**

Iterative conceptualisation is the mechanism for analysing the data to increase the level of abstraction and move the degree of conceptualisation beyond description to a more theoretical domain; by applying theoretical sensitivity during the interpretation of the coding based on the input from constant comparison, as well as from theoretical memos (Urquhart, 2001) (cf. Sections 4.7.1.1).

**Scaling up**

Scaling up is the process of grouping higher-level categories into broader themes i.e. the core category (cf. Section 4.7.1.2), which allow for the theoretical generalisability.

4.7.1.2 Grounded Theory Procedures

This section explains the Straussian approach for procedures of analysis. These procedures were followed by this research and it will be shown subsequently how they were combined with the case study research method to form a viable research methodology. Hekkala (2007) notes that most IS researchers rely upon the Straussian approach to provide procedures for applying a Grounded Theory.

Briefly, Figure 4.1 shows the sequence tracked in order to develop the research model (theory).
Coding is the main step in Grounded Theory and is defined as the,

“analytic processes through which data are fractured, conceptualised, and integrated to form theory.” (Strauss and Corbin 1998, p. 3)

It commences immediately after the first interview in the early stages of data collection. The researcher must apply two types of analytical technique. The first is constant comparison (cf. Section 4.7.1.1) analysis, wherein the researcher is required to compare incidents for similarities and differences. Each incident that is revealed conceptually similar to previously coded incidents is given the same conceptual label and grouped under the same code (Corbin and Strauss, 2008). In this technique, the researcher is required to be theoretically sensitive (cf. Section 4.7.1.1), identify the significant data and assign a meaning for it using theoretical memos (cf. Section 4.7.1.1). The constant comparison analysis should continue throughout the coding paradigm until the point of theoretical saturation is reached (cf. Section 4.7.1.1). The other technique is to continue asking questions that emerge from previous concepts, memos or responses from interviewees. As the researcher moves through the interviews, questions will be refined and modified based on this analysis (Corbin and Strauss, 2008). Charmaz (2006) proposed three types of questions:

1. Initial questions where the researcher asks general and wider questions, such as “Tell me about what happened?”
(2) Intermediate questions where the researcher goes deeper to understand the issue, such as “Who, if anyone, was involved?”, “when was that?” and “how were they involved?”

(3) Ending questions where the researcher looks for the lesson learned, such as “After having these experiences, what advices would you give?” As aforementioned in Section Grounded Theory Approaches, it is important to highlight that during coding the researcher must put aside any preconceived ideas and let the data emerge (Urquhart, 2001; Corbin and Strauss, 2008).

There are three coding steps need to be used when developing a theory by applying the Straussian approach to procedures of analysis. They are set out below.

**Open Coding**

Open coding is the process of “breaking data apart and delineating concepts to stand for blocks of raw data” (Corbin and Strauss 2008, p. 195). This includes the identification of the proprieties and dimensions of the defined concepts. The researcher is required to be theoretically sensitive (cf. Section 4.7.1.1) by reviewing the excerpts line by line and focusing on the main ideas (Corbin and Strauss, 2008). The careful reviewing of different codes, when similar, will lead to the formation of a concept. Concepts are:

“Words that stand for groups or classes of objects, events and actions that share some major common property(ies), though the property(ies) can vary dimensionally.” (Corbin and Strauss 2008, p. 45)
Categories are formed at a higher level. Categories are more abstract than concepts and they are produced by a constant comparison of the similarities and differences between the latter based on their properties and dimensions (Corbin and Strauss, 2008). At this stage, it is important to generate the initial category by grouping concepts that are similar in their properties and dimensions (Strauss and Corbin, 1990; Corbin and Strauss, 2008). The name or label given to a category must be selected logically and is usually signified by the data (Strauss and Corbin, 1990; Corbin and Strauss, 2008).

**Axial Coding**

The aim of axial coding is to start the process of re-grouping data that was broken during the open coding process. Axial coding was defined by Straus and Corbin when they said:

“Process of relating categories to their subcategories ... [along the line of their] properties and dimensions.” (1998, p. 123)

In axial coding, the ‘paradigm model’ (an analytic strategy developed to help analysts integrate structure with process) (cf. Section 4.7.1) is applied to enable the researcher to think systematically about the data and its interrelationships (Strauss and Corbin, 1998; Corbin and Strauss, 2008). Six factors were applied in the paradigm model to identify the relationships between the categories and their sub-categories as follows (Strauss and Corbin, 1998; Corbin and Strauss, 2008):
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1. Causal conditions represent incidents or events that guide the researcher to the occurrence of the phenomenon. They are a conceptual way of grouping answers to questions such as “Why, where and when?”

2. Phenomena represent the main ideas or events about which a set of actions/interactions are directed or handled.

3. Context refers to the set of conditions related to a phenomenon under which action/interaction strategies are followed.

4. Intervening conditions are conditions that facilitate or restrict action/interaction strategies under a specific context.

5. Action/interaction strategies or procedures are produced by individuals or groups in order to react to problems or events that occur within a particular set of conditions.

6. Consequences are the outcomes of actions and interactions.

It is important to clarify that axial and open coding are not sequential. During the axial coding process the researcher should continue to use constant comparison and ask questions while, at the same time, develop relationships between concepts in order to allow data to emerge continuously throughout the analysis. (Strauss and Corbin, 1998; Corbin and Strauss, 2008)

Selective Coding

Selective coding is:

“The process of integrating and refining the theory.” (Strauss and Corbin 1998, p. 143)
This is the final step in the coding procedure and aims to identify the main theme of the research via a determination of its central or core category. The core category is recognised at this stage, as are the other ones that are linked to it (Strauss and Corbin, 1998). The selective coding step is similar to axial coding but is undertaken at a higher and more abstract level. In this step, the categories are refined at a high level of abstraction, during which the category that demonstrates the greatest explanatory power and highest ability to connect all the other categories together is selected as the core (Strauss and Corbin, 2008).

Corbin and Strauss (2008, p. 105) suggest five criteria for identifying the core category as follows:

1. It must be abstract; that is, all other categories can be related to it and placed under it.
2. It must appear frequently in the data.
3. It must be logical and consistent within the data.
4. It should be sufficiently abstract so that it can be used to undertake research in other substantive areas.
5. It should grow in depth and explanatory power as each of the other categories is related to it through a statement of their relationship.

Finally, theoretical integration (cf. Section 4.7.1.1) is important to complete the last part of Grounded Theory procedure to achieve successfully building the theory, which is the main benefit of deploying these procedures (Urquhart et al., 2010). Glaser and Strauss (1967), Corbin and Strauss (2008), Urquhart et al. (2010), and Birks and Mills (2011) recommend that that the researcher need to scaling up (cf. Section 4.7.1.1) the level of
the theory and look for theoretical lens by integrate the theory to other theories in the same or similar field.

Before the end of this section, it is important to mention that the researchers may need to validate their coding analysis through checking with independent reviewer(s) as Corbin and Strauss (2008) did when they sent part of their analysis to their interviewees for comments and feedback. This is consistent with other qualitative data analysis methods, such as thematic analysis (Miles and Huberman, 1994) as an essential component of the procedure for ensuring coding validity.

4.8 Sample

Sampling in Grounded Theory is based on theoretical sampling (cf. Section 4.7.1.1) and it allows an in-depth exploration of concepts that are related to the phenomena and population (Corbin and Strauss, 2008). The sampling for the first interview is based on the literature while the next sampling is based on analysis of the previous interview. In fact, the emerging concepts constantly direct the researcher to the nature of future data, the next interviewees and the issues to be discussed in subsequent interviews in order to develop the categories further. The sampling should focus on incidents rather than persons, collecting data about what informants do or do not do in terms of actions/interactions and their conditions and consequences. Purposive sampling is the selection of the sample that is most likely to generate valuable data that can address the research problem (Oates, 2006). Theoretical sampling (cf. Section 4.7.1.1) is, therefore, the form of purposive sampling (Patton, 1990) that is adopted in this research. The aim of purposive sampling is to identify a set of people who hold specific features or live in
a situation related to the social phenomenon being studied (Mays and Pope, 1996). The researcher continues theoretical sampling until reaching the point of theoretical saturation (Denscombe, 2007) (cf. Section 4.7.1.1).

4.9 Criteria for Evaluating the Quality of Research Design

Many researchers have proposed different criteria for evaluating the quality of the research by applying case studies, such as Yin (2009) and the Grounded Theory proponents Glaser and Strauss (1967) and Strauss and Corbin (1990). Strauss and Corbin (1990) described a set of criteria suitable for Grounded Theory by ensuring that concepts, categories and theories are fully developed and grounded. This is inappropriate as the combination of the case study and Grounded Theory are being used for the current research. Yin's (2009) proposed criteria are suitable only for positivist research (Golafshani, 2003). As this research applies an interpretive paradigm with the aim of understanding phenomena within their natural settings by using a combination of Grounded Theory and case study, the set of criteria provided by Lincoln and Guba (1985) are more appropriate as they are designed to evaluate interpretive qualitative research while covering the whole research process. These criteria are:

4.9.1 Credibility

This criterion evaluate that the research subject, research questions and unit of analysis, as well as the main and secondary sources for data collection are correctly identified. The important aspects for increasing and enhancing the credibility of the research include using multiple sources of data, involving different respondents, spending sufficient time in the field and allowing participants to verify their responses.
4.9.2 Transferability

This criterion evaluates that readers are given enough information to judge whether the findings can be transferred to other situations. As aforementioned in Section 4.3.7, the generalisation in interpretive research relates to the context rather than to large populations. Therefore, the aim of this criterion is to provide the reader with rich, and thorough information about the context under examination.

4.9.3 Dependability

This criterion evaluates that the research process is systematic, explainable, and justifiable. The researcher should provide an explanation of the methods used and the approaches taken in the research.

4.9.4 Conformability

The aim of this criterion is to establish that certain steps were followed in order to verify that the results of the study were based upon the collected data. Evidence, showing the raw data and demonstrating the steps of the analysis undertaken, is required to meet the requirements of this criterion.

4.10 Research Design

Figure 4.2 shows how a case study is integrated with Grounded Theory as a research strategy within this research (cf. Section 4.4). As shown by this figure, the researcher starts to review the literature with the goal of identifying gaps, discovering new areas of research or extending the existing body of knowledge. Based on this review, the phenomenon studied is increasingly bounded and the principal research questions and
research aim become identified. The literature review helps the researcher to develop the initial questions for the interviews, and to enhance theoretical sensitivity and sampling. The potential cases and units of analysis are selected for their significance to the research question. The research protocol is then prepared, including the initial questions (cf. Section 4.7.1.2) that are to be asked in the field, while considering the need for flexibility and to allow new data to emerge. Data mainly is collected from interviews but also possibly from documents. In terms of fieldwork, the interaction between data collection and analysis is processed simultaneously by identifying concepts emerging from the first interviews so that the phenomena under study becomes more defined as time progresses. In other words, the researcher continues to be theoretically sensitive by applying theoretical sampling and constant comparison until achieving theoretical saturation, which is the point at which no new concepts emerge. This is achieved within a systematic process of coding (cf. Section 4.7.1.2), beginning with the first interview in the field and concluding after achieving theoretical saturation. In this research, the findings relate to CSFs and their interrelationships of CRM as well as to the relationship between the CSFs and key development stages of CRM. Institutional Theory (cf. Section 7.4) will be applied to provide a theoretical explanation for the findings (the selection of the theory was made after identification of the core category). The researcher must also demonstrate the originality the study and its contribution to the relevant body of knowledge by comparing the present research with previous ones. These elements ultimately form the research model. The complete model forming process must then be evaluated according to the criteria of credibility, transferability; dependability and conformability (cf. Section 4.9).
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Research Methodology

Literature Review

| CRM Overview | CRM Implementation | CSFs for CRM Implementation | Study Context |

Finalised the Research Questions, Aim and Topic

Research Strategy

Grounded Theory

Case Study Strategy

Research Boundary (cases and units of analysis)

Case study protocol

Integration

Theoretical Sampling

Theoretical Sensitivity

Constant Comparison

Theoretical Saturation

Data Collection

Interviews

Documents

Websites

Data Analysis

Open Coding

Axial Coding

Selective Coding

Research Findings

CRM CSFs

The interrelationships between CRM’s CSFs

The relationships between CSFs and key development stages of

Theoretical Explanation

Institution Theory

Research Evaluation

Credibility

Transferability

Conformability

Dependability

Research Model

Figure 4-2: Research Design
4.11 Conclusion

This chapter described the research methodology adopted by this research. First, it introduced the principal research paradigms, namely positivist, interpretive and critical. It explained several research strategies, data collection methods and data analysis methods. During this chapter, the researcher justified the selection of the appropriate research philosophy, strategy and methods for this research. The chapter provided a detailed explanation of the selected data collection and analysis methods. It explained the research design for integrating a case study with Grounded Theory. Finally, it offered criteria for evaluating the quality of the research.
Chapter Five: Data Collection Process

This chapter describes the procedures followed by this research for the fieldwork data collection process. Section 5.1 explains how the data was collected including the choice of case studies and their organisational backgrounds, the ethical issues involved with fieldwork, and the case study protocol (cf. Section 4.3.7.1). Section 5.2 describes the actual fieldwork that took place (including the pilot study), the outcomes of which are presented in Chapter 6.

5.1 The Planning of the Fieldwork Data Collection Process

The main aim of this research is to develop an integrated model that comprises the CSFs and their interrelationships to support effective implementation of CRM projects within the private sector of the KSA. (cf. Section 1.3). Collecting data from different stakeholders, both internal and external to the case study organisations, was key in helping the researcher to understand the problem in depth and to achieve the main research aim. In this section, the researcher explains the selection of the case studies, the ethical considerations for the research, and the case study protocol (cf. Section 4.3.7.1).

5.1.1 Selection of the Case Studies

It is important to highlight that the private sector was selected as it is considered more likely to be investing in implementing latest technology and IS solutions. In addition, they have a very active relationships with customers. The majority of those implementing CRM in the KSA are working within the private sector. Finally, obtaining accessibility within the private sector was much easier than in the public sector.
Six organisations were selected as potential case studies to represent a variety of private sectors of KSA (i.e. banking, telecom, automotive and transportation). Each of the organisation that were selected as case studies were known to have implemented a CRM project, and access could easily be gained in order to obtain a rich view about the CRM implementation and enable a wide range of relevant factors to be examined from the viewpoint of many interested parties.

It is important to acknowledge that the potential selected organisations may not represent the whole private sector of the KSA. Selecting other organisations should form part of further research and investigation. However, as Grounded Theory is the overarching strategy (with case studies incorporated within that strategy), theoretical sampling had to be applied by continuing to interview more people within the organisations, until theoretical saturation was achieved (cf. Section 4.7.1.1).

Three employees per organisation who seemed most relevant to the research, from different project stakeholders, such as from a project management team, business and an IT department, were initially selected as part of a purposeful sampling (cf. Section 4.8) to participate in the interviews and provide relevant data related to CRM implementation (cf. Section 4.7).

Twenty customers of the above six organisations representing different ages, sex, marital status, parents and educational levels were initially selected also as part of purposeful sampling (cf. Section 4.8) for interview in order to acquire a rich and integrated view of the CSFs for CRM implementation from the customer’s viewpoint.
Since Grounded Theory was selected as the qualitative data analysis method, theoretical sampling (cf. Section 4.7.1.1) had to be applied by continuing to interview more people in order to achieve theoretical saturation (cf. Section 4.7.1.1) until the principal questions of this research were deemed to have been answered.

The unit of analysis was the organisation. The main sources were the perceptions and viewpoints of the participants that have a relationship within their organisations i.e. employees and customers. Secondary sources were also used to enrich understanding where available and appropriate, such as an organisation’s website, minutes of meetings, internal and external audits and project progress reports.

5.1.2 Organisations’ Backgrounds

A brief description of the six organisations, each operating within the private sector of KSA, is provided below.

5.1.2.1 Saudi Telecom

The Saudi Telecom Company (STC) was established in 1998. It is the largest telecommunications provider in the KSA. STC provides multiple communications services, which are distributed in four sectors; fixed line, mobile, enterprise and wholesale. STC operates as a mobile service’s operator in different countries, such as Indonesia, India, Malaysia, Kuwait, South Africa, Turkey and Bahrain. The company, therefore, serves more than 140 million customers worldwide including 22 million inside the KSA. STC has around 20,000 employees. Its revenue in 2010 was USD 14 billion (Saudi Telecom, 2012; Tadawul, 2012).
5.1.2.2 Saudi Public Transport Company

Saudi Arabia Public Transport Company (SAPTCO) was established in 1979, with a capital of nearly USD 267 million and five thousand employees, to offer the public a bus transport service. SAPTCO operates 24/7 with 3,000 buses of various capacities and sizes connecting 600 cities, towns and villages in KSA, as well as travelling to nine other countries, such as Kuwait, Bahrain, Qatar, Egypt, Jordan, and Syria. Different services, such as school and college transportation, VIP services and tourist excursions, are provided on a daily basis. Hajj and Ramadan are the busiest times where the company operates at maximum capacity. The number of passengers transported by SAPTCO has reached more than 2.005 billion. There are 161 travel agents inside and outside the KSA offering SAPTCO services (SAPTCO, 2012; Tadawul, 2012).

5.1.2.3 Albilad Bank

Albilad bank was established in November 2004 with a capital of USD 800 million. The main aim of the bank is to provide all Islamic compliant banking services. The bank has 3,000 employees and it made a profit of more than USD 24.5 million in 2010 (Albilad Bank, 2012; Tadawul, 2012).

5.1.2.4 Toyota Company

Toyota is the world's largest car producer. Its headquarters is in Japan. Kiichiro Toyoda founded Toyota in 1937. It has around 317,734 employees worldwide. Toyota has 37 branches distributed in 25 cities within the KSA (Tadawul, 2012; Toyota, 2012).
5.1.2.5 **Al-Rajhi Bank**

Al-Rajhi bank is one of the largest banks in Saudi Arabia. It was established in 1978 and it joined the stock market at 1986 with a capital of USD 4 billion in 2008. The Al-Rajhi family currently holds 44% of the Bank’s shares while the General Organization for Social Insurance (GOSI) holds another 10%. The number of employees exceeds 8,000, distributed between its headquarters and more than 500 branches. Recently, the bank has started operating in Malaysia and Kuwait (Al-Rajhi Bank, 2012; Tadawul, 2012).

5.1.2.6 **Arab National Bank**

The Arab National Bank was established in 1979 with a capital of USD 2.3 billion, and recently was ranked among the 10 largest banks in the Middle East. It provides its services to its customers through 178 branches and its headquarters are located in Riyadh. The net income in 2009 was USD 509.6 million. Customer deposits have reached USD 22.3 billion in 2010 with total assets of USD 30.9 billion (Arab National Bank, 2012; Tadawul, 2012).

5.1.3 **Ethical Considerations**

The researcher worked in accordance with the ethical review procedures of the University before commencing the fieldwork. Since the research involved human interaction in the form of participants’ interviews, the following documents, which can be found in Appendix B, were obtained.

1. A letter approved by the supervisors and the University to help the researcher obtain participants’ access approval from the organisations. The letter confirmed that the aim
of gathering data was for scientific purposes only, and described how the data was to be collected and held.

2. A document outlining the objectives of the project, which was shown to the participants before asking them any questions regarding the research.

3. A consent form, which explained the research and the requirements and rights of the participants, which was to be signed by both the participants and the researcher to indicate acknowledgement and agreement.

In addition, the approval of the Faculty Human Research Ethics Committee (FHREC) was obtained.

5.1.4 Case Study Protocol

The purpose of case study protocol is to guide the researcher in the data collection stage (Yin, 2009) (cf. Section 4.3.7). Such a protocol, therefore, was prepared before commencing the fieldwork as shown in Table 5.1. It included the research’s objectives, topics, field notes, interview guides and some of the initial questions that were used in the field. Based on the taxonomy of CSFs for CRM, which were proposed earlier (cf. Section 3.5) as part of the literature review of this research and Charmaz’s (2006) Grounded Theory questions technique (cf. Section 4.7.1.2), initial semi-structured questions were prepared separately for organisations members and customers in order to investigate CRM implementation in general.
### Objective of the research

This research aims to develop an integrated model that includes CRM’s CSFs and their interrelationships to support effective implementation of CRM projects within the private sector of the KSA. The focus of the interviews is to be on the perception of CSFs of CRM implementation from the point of view of both the organisations (project management team, business staff and IT) and their customers. To obtain in-depth and relevant information on the research questions, a series of semi-structured interviews are to be conducted, which affords the participants the opportunity to elicit their opinions, knowledge, and experiences over a wide range of issues.

#### The key issues of the research are:

1. To identify the CSFs and their interrelationships that affects CRM implementation within the private sector of the KSA from the perspectives of both the organisations and their customers and compares them with those of developed countries.

#### The main research question is:

What are the CSFs and their interrelationships that affect CRM implementation within the private sector of the KSA?

The main research question can be usefully divided into three sub-questions:

1) What CSFs for CRM projects implementations have already been identified within developed countries and/or developing countries?

2) What CSFs and their interrelationships emerge from existing CRM implementations in the KSA, and why are they different (if they are) from those within developed countries? Does the culture have an impact?

3) What are the key development stages of CRM implementation and how do the CSFs identified in the KSA relate to these stages?

### Field note

The fieldwork for this research is to be held in the KSA. The researcher will obtain the necessary consent to interview the key people who are responsible or involved in CRM implementation for the selected organisations (project management staff, IT staff and business staff) and their customers. The interviews will be conducted in the KSA over three months from 27/03/10 to 26/06/10.

### Interview guides

- The researcher will inform the interviewees of the time and the date of the interviews.
- The researcher will show the interviewees an official letter obtained from the University declaring that the data is being gathered for scientific purposes.
- The researcher will seek the permission of the participants to record the sessions.
- The researcher will seek the permission of the participants to be identified in this research.
- The researcher will show the participants the objectives of the research.
- The researcher will use an audio recorder and take written notes directly during the interview.
- The researcher will start with a brief introduction for each interview.
- At the end of each interview, the researcher will summarise the issues discussed and give the interviewees the opportunity to correct or update them.
Examples of questions for organisations before starting the interviews

1. The organisation’s background
   What is the size of your organisation in terms of type of industry, number of employees and revenue?

2. The participant’s background
   What is your position and role in the organisation?

3. The project’s background
   3.1 Initial questions
   - Could you please explain how CRM project implementation started within your organisation?
   - What happened next? When was that?
   - Why have you implemented CRM? Did you take part in making the decision? Why/Why not?

Intermediate questions and ending questions will be based upon the answers that emerge from the initial questions or from customers’ responses during their interviews.

Examples of customers’ initial questions

Could you give brief information about yourself, including gender, age, education level, marital status, professional and number of children?

Have you ordered any services from the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank? If yes, which channel did you use?

Have you heard about something called "Customer Relationship Management" implemented in Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank?

| Table 5-1: Case Study Protocol |

5.2 The Execution of the Fieldwork Data Collection Process

The researcher commenced the fieldwork phase of the research with a pilot study to refine the interview in terms of the time taken, location, questions (cf. Section 4.3.7.1) and to update the case study protocol as necessary. The pilot and fieldwork studies are described in the following sections.

5.2.1 Pilot Study

Since the scope of the research was within the private sector of the KSA, the researcher used one CRM project for the enterprise sector i.e. that of STC, to be the pilot study (cf. Section 5.2.1). Two interviews were conducted. One was with the enterprise CRM project manager and the other with the business support head. The researcher used the
initial questions that were proposed in the case study protocol (cf. Section 5.1.4). As a result, the initial questions used for the fieldwork proper were amended. The interviews were subject to disturbances as they were conducted at the interviewees’ places of work during working hours. As a result, most of the interviews conducted for the fieldwork proper were held in the coffee shop away from work and outside working hours. In general, the interview procedures were refined and updated for the actual fieldwork based on the results of the pilot study.

5.2.2 The Actual Fieldwork Study

Most of the interviews were planned and agreed with the interviewees two months in advance. The purpose, aim, date and time of the interviews were explained and agreed via email. In order to increase the creditability of the research, examples of these emails were retained (see Appendix D). Before starting the interview, a consent form explaining the research, its requirements, and the rights of the participants were shown to each interviewee. Both the participant and the researcher signed the consent form (cf. Section 5.1.3). Permission to record their interviews and for their signed agreements to be identified was obtained from 90% of the interviewees. Ten percent, however, refused to be recorded or identified. For these interviewees, summary data from notes taken during their interviews was prepared and presented anonymously.

The researcher started the interviews by giving a brief description of the research to the company and the interviewees. Each interviewee began by describing his organisation’s background, including its size, type, number of employees, and revenue. The interviewee’s position and role, which has already been considered earlier during the
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selection process, was confirmed during the interview. An audio recorder was used and notes were taken during most of the interviews.

Table 5.2 shows examples of the three types of questions (cf. Section 4.7.1.2) that were used in the interviews. The first interview was with the CRM programme director of STC. He was asked general semi-structured questions during the first part of his interview to explore the history of his organisation’s CRM implementation in detail. More precise questions were subsequently put based upon his responses to these initial questions. As a result, the researcher obtained an in-depth understanding of the issues. The ending questions were used to summarise his opinions and extract the lessons to be learned.

It is important to mention that the use of theoretical sampling (cf. Section 4.7.1.1) and constant comparison (cf. Section 4.7.1.1) formulated and directed the types of questions used and the choice of the next interviewee.

Three other participants from different departments within STC were interviewed to address all aspects of this company’s CRM implementation. As the main research question was not addressed during the first case study, further interviews were conducted at another four organisations. Four participants per organisation were interviewed. Therefore, twenty employees were interviewed in total.

In addition to the above employee interviews, in order to achieve theoretical saturation (cf. Section 4.7.1.1) and obtain a richer view of the CSFs for CRM implementation,
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thirty-one customers of the above five organisations (19 females and 12 males) were interviewed. In addition, three other people, an Islamic scholar, an employee of the Saudi Arabia Monetary Agency (SAMA), and an employee of the telecom regulator were identified as useful sources of information, and subsequently interviewed. The five organisations were subsequently re-interviewed because of the responses collected from their customers’ interviews.

Since theoretical saturation (cf. Section 4.7.1.1) had been achieved by interviewing the five organisations and its thirty-one customers, the researcher decided not to conduct any interviews with the sixth identified organisation, that is, the Arab National Bank.

Theoretical memos (cf. Section 4.7.1.1) were successfully completed for most of the interviews. In general, analysis of the interviews began immediately after each one had been completed. However, some analysis occurred at later stages owing to the limited time between interviews. In this case, new questions were based on notes taken, theoretical memos or listening to excerpts.

At the end of each interview, the researcher summarised the issues and sought any further comments that the participants may wish to add.
### Examples of interviews’ questions:
The following are examples of questions that were used during fieldwork interviews for both organisations and customers because of applying theoretical sampling and constant comparison.

#### Examples of Questions for Organisations

1. **Organisation’s Background**
   - What is the size of your organisation in terms of number of employees and revenue?
   - What type is your organisation? (e.g. Banking, Telecom or Manufacturing)
   - What is your position and role in the organisation?

2. **Project’s Background**
   2.1 **Initial questions**
   - Could you please explain how CRM project implementation started in your organisation?
   - Could you please explain what happened in each phase?
   - Could you explain what happened after signing the Siebel contract? When was that?
   - How would you define the success of CRM implementation?
   - Why have you implemented CRM? Did you take part in making the decision? Why/ Why not?

   2.2 **Intermediate questions**
   - What was exactly the issue with integration and the repository? Could you explain?
   - Did project management communicate a missing business requirements challenge to upper management?
   - Could you tell me how many project meetings you have? Who normally attend these meetings? How often do these meetings occur during the period of the project?
   - Could you explain what the greatest challenge in these meetings is?
   - Have the project’s milestones been met on time? Why/ Why not?
   - What were the original time lines and the budget of the project? Were these changed?
   - The IT project manager said: "The project’s time line was not realistic and they have tried to communicate that to upper management but they did not listen." Is it true? What is your opinion?
   - It has been said: "The project team has difficulty to get your requirements to be included in the RFP." Is it true? Can you explain this? Is this requirement aligned with your vision?
   - Some customers refuse to share their personnel data with your company; owing to its culture, (e.g. females rely on their fathers or brothers personal data to get your services? Do you agree? What is the percentage? How do you overcome this problem?
   - Did you provide any awareness campaign for your customers to explain the benefits of the new concept (CRM)? How you protect their privacy with the new system?

2.3 **Ending questions**
   - What do you think is the right stage for a CRM champion’s team?
   - What do you think is the right stage to build the CRM strategy?
   - If you were to do the project again, what would you do differently to avoid the issues of integration?
### Examples of customers' questions

Could you give brief information about yourself, including gender, age, education level, marital status, professional and number of children?

Have you ordered any services from the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank? If yes, which channel did you use?

Have you obtained any services from the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank under your name? Why/Why not?

Have you heard about something called "Customer Relationship Management" implemented in Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank?

Have you shared your personal data with the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank? Why/ Why not?

Do you feel confident that your personal data are safe and it will not be used improperly? Why/ Why not?

Have you received any offers that target your category?

Are you aware of the benefits of sharing your personal data with Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank?

In your opinion, did the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank meet your needs by analysing your attitude? Why/ why not?

Have you been invited by Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank to explain future needs and requirements?

Have you seen or heard anything about Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank to introduce a new concept called CRM?

Have you noticed any changes in the services of the Al-Rajhi bank /STC/SAPTCO/Toyota/Albilad bank after CRM implementation? Was it positive or negative? Explain

| Table 5-2: Examples of Organisations’ and Customers' Questions Used in Actual Fieldwork |

#### 5.3 Conclusion

This chapter discussed all the issues that related to the planning and undertaking of the data collection process. The selection of case studies was justified and ethical issues were considered. The case study protocol was explained, including the research’s objectives, interviews guidelines, field notes, and interviews questions. The pilot and actual fieldwork studies were described. This chapter forms the basis for the analysis of the data, which is covered in the next chapter.
Chapter Six: Data Analysis

This chapter discusses the fieldwork findings conducted within five organisations that operate within the private sector of the KSA and their customers. In addition, further data was collected by interviews held with three interviewees, namely, a SAMA employee, a telecom regulator and an Islamic Scholar. This chapter presents an analysis of this data. Section 6.1 provides an explanation of the findings using Grounded Theory procedures to analyse the data. Section 6.2 illustrates the results of the analysis of the data collected from the customers. Section 6.3 illustrates the results of the analysis of the data collected from the organisations. Section 6.4 identifies the core category by discussing its influence on the other categories with the ultimate aim of presenting the research model in the next chapter. Section 6.5 describes the interrelationships between concepts (CRM’s CSFs). Finally, Section 6.6 identifies the relationship between concepts (CRM’s CSFs) and CRM development stages.

6.1 Application of Grounded Theory Procedures

Concepts and categories are identified by following the Straussian approach of Grounded Theory. In this approach (cf. Section 4.7.1.2), the researcher conducts a constant comparison (cf. Section 4.7.1.1) of different types of data continuously swapping between data gathering and data analysis i.e. the data that emerges from data analysis is used as the basis for collecting further data.

Analysis of the interviews commenced immediately following each interview according to prescribed steps (cf. Section 4.7.1.2). The first step in the data analysis process was to transcribe the recorded interviews into text. The second step, since most of the
interviews were in Arabic was for the researcher to produce an English translation of the text. Two Arabic and English native speakers were then asked to assess the validity of the translation by ensuring that both texts had the same meaning. A unique code was assigned to each excerpt, for example, (Cu.Sap6.F.Q5) was assigned to the following excerpt “They should have strong data confidentiality procedures, i.e. very strict rules for punishing people who break the rules of data confidentiality.”; this means question number five for female customer, number six, of SAPTCO organisation. Table 6.1 shows all the abbreviations that have been used for both customer and organisational excerpts.

<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Meaning</th>
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<tbody>
<tr>
<td>Cust</td>
<td>Customer</td>
</tr>
<tr>
<td>Org</td>
<td>Organisation</td>
</tr>
<tr>
<td>M</td>
<td>Male</td>
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<td>F</td>
<td>Female</td>
</tr>
<tr>
<td>Q</td>
<td>Question</td>
</tr>
<tr>
<td>STC</td>
<td>Saudi Telecom Company</td>
</tr>
<tr>
<td>R</td>
<td>Al-Rajhi Bank</td>
</tr>
<tr>
<td>B</td>
<td>Albilad Bank</td>
</tr>
<tr>
<td>Toy</td>
<td>Toyota Company</td>
</tr>
<tr>
<td>SAPT</td>
<td>SAPTCO Company</td>
</tr>
<tr>
<td>Regulator</td>
<td>Telecom Regulator</td>
</tr>
<tr>
<td>SAMA</td>
<td>Saudi Arabian Monetary Agency</td>
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<tr>
<td>Islamic</td>
<td>Islamic Scholar</td>
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<tr>
<td>CC</td>
<td>Customer Care</td>
</tr>
<tr>
<td>BM</td>
<td>Business Marketing</td>
</tr>
<tr>
<td>BS</td>
<td>Business Support</td>
</tr>
<tr>
<td>PD</td>
<td>Project Director</td>
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<tr>
<td>PM</td>
<td>Project Manager</td>
</tr>
</tbody>
</table>

Table 6-1: Abbreviations Used Within Both Customer and Organisational Excerpts
The third step was to perform line-by-line coding for interpretive analysis (cf. Section 4.7.1.2), by labelling significant words and key points. An example of an interview with a customers of STC, which has been transcribed and translated by the researcher, and then analysed by using line-by-line labelling, is provided in Appendix C. In this example, the researcher started with personal information provided by the participants followed by supporting questions, such as “Have you ordered any services from the STC?” to confirm that the right customer had been selected. It is important to state that the researcher has endeavoured to be theoretically sensitive (cf. Section 4.7.1.1) in the process of code labelling rather than descriptivist. For example, when an STC customer responded to the researcher’s question “Do you feel confident that your personal data are saved and will not be used badly by STC? Why/ Why not?” she responded,

“Not sure. I heard of many cases of other people whose personal data has been sent to other commercial companies without their permission. Thus, it is very difficult to be confident about sharing your personal data.”

In this short excerpt, specific keywords were labelled via underlining as potential items representing codes or concepts. By reviewing the first keywords underlined, it can be recognised that ‘Legality’ could be an interpretive labelling of the code. Additional issues emerged from this answer, which led the researcher to ask different questions to STC employees and the telecom regulator regarding the legality of sharing customers’ information without permission. Their responses confirmed the customer’s statement that there are insufficient rules pertaining to data protection within the company’s regulations.
A further concept identified was 'trust', which was extracted and recognised from the excerpt, “very difficult to be confident about sharing your personal data”. The researcher proposed the concept of 'trust' that could interpret and justify the reason for customers not giving their personal data to the STC. This concept was confirmed by different codes, as further explained in Section 6.2. Throughout the process, and after 'dimensionalisation' (cf. Section 4.7.1.1) was applied, similarities were observed in the properties (cf. Section 4.7.1.1) of the concepts, which can therefore be grouped into one category. For instance, and as shown in Appendix C, the concepts' 'data accesses', 'data confidentiality' and 'data sharing' also emerged from the data collected. At this point, the researcher found that these concepts, namely; 'trust', 'data confidentiality', 'data access' and 'data sharing', share similar properties; and they were thereby grouped into one category. 'Data privacy' was selected as the umbrella term for this category, a more detailed description of which is presented in Section 6.2.1. The researcher's experience and knowledge (cf. Section 4.7.1.1) from the literature review led to the recognition of the importance of having a 'data privacy' concept. The researcher continued the same process of looking for more slices of data with the ultimate aim of identifying all the potential concepts and categories.

The fourth step in the data analysis process is axial coding (cf. Section 4.7.1.2) where the researcher strived to identify the relationships between the categories. For instance, the 'data privacy' category was found to have an impact on the identified 'data quality' category. This relationship was identified when a participant said:
“I am not confident; in order to increase trust, the bank should have a clear procedure for data privacy. Otherwise, it is very difficult for females in our society to give their personal data.”

The above example shows that female customers set ‘data privacy’ as a condition for sharing their personal data, thus affecting the ‘data quality’ category. This relationship was highlighted by many of the customers. Linking the relationships between categories was a continuous process until all the possible relationships were identified. The researcher continued to use constant comparison (cf. Section 4.7.1.1) while, at the same time, developing relationships between concepts in order to allow data to emerge continuously during the analysis. In addition, and as result of this step, the researcher was then able to finalise the relationship between the CSFs and the developmental stages of CRM implementation. For example, when the participant from Al-Rajhi bank said:

“Planning is the right stage for setting up measurable goals and metrics.”

It confirmed what has been stated earlier in Section 3.2 and by Sanad et al. (2010, p. 1) when they said:

“CSFs are hierarchical and can be identified at various levels in an organisation or a project.”
The researcher continued asking questions of the organisations’ participants by enquiring with regard to lessons learned to identify the relationship of CSFs and the development stages of CRM implementation (cf. Section 6.6). Having done this, all coding was closely examined where necessary.

The final step in the data analysis process was selective coding (cf. Section 4.7.1.2). All the categories were examined and refined as part of scaling up (cf. Section 4.7.1.3) in order to identify the core category (cf. Section 4.7.1.2) and the central phenomena, which is, in this research, the 'culture' category. This category was linked to other ones to reveal its influence as described later in this chapter (cf. Section 6.4).

It is important to mention that both organisations and their customers' perspectives were merged from the beginning of the interviews. Generally, first customers’ questions emerged from the interviews with first organisations and the outputs of these were communicated again to all organisation employee interviews through questions to verify customers’ statements. Both customers and organisations interviews continued to emerge from each other until theoretical saturation (cf. Section 4.7.1.1) was achieved, as shown in Figure 6.1.

For the purpose of presenting the findings clearly, the researcher divided them into five sections; Section 6.2 for customers' perspectives, Section 6.3 for organisations' perspectives, Section 6.4 for identifying the core category, Section 6.5 for showing the interrelationships between concepts (CRM’s CSFs), and Section 6.6 for identifying the relationship between concepts (CRM's CSFs) and the CRM development stages.
It is important to mention that an internal reviewer (a student who has obtained a PhD recently) was invited to review most of the analysis to examine the entire coding process (cf. Section 4.7.1.2). Although, his feedback was limited, the researcher considered this in the steps for coding analysis.

As a result of this stage, the findings of the research will be explored via a theoretical lens i.e. Institutional Theory (cf. Section 7.4). It is the final part of applying Grounded Theory which called theoretical integration (cf. Sections 4.7.1.1 and 4.7.1.2) with the ultimate aim of presenting an in-depth research model (cf. Section 7.5) in depth in the next chapter.

![Figure 6-1: The Influence of Prior Data Collection Activities on Fieldwork Questions](image-url)
6.2 The outcome of the analysis based on the customers’ perspectives

Seven categories were identified by analysing customer responses; however, additional interviews with an Islamic Scholar and a SAMA employee were required to answer some emerged questions from both organisations and customers. The analysis of these interviews is explained in the following seven subsections. Most of the concepts emerged from different passages of the transcript; however, some emerged from the same passage within an interview transcript. The outcome is supported within this section by illustrative quotations taken from the relevant transcripts.

6.2.1 Data Privacy

A number of concepts were identified from customer responses: customer trust, data confidentiality, data access and data sharing. All of these concepts represent data privacy for the organisations’ customers. Customer responses revealed the need for defined data privacy rules to protect their data. Customer trust regarding the sharing of their personal data with organisations was predicated on the rules of data privacy being disclosed by those organisations. Both male and female customers had concerns about data privacy. However, females were more concerned than males, particularly if personal data was likely to be handled by male employees. This can be attributed to gender attitudes in Saudi society and part of Saudi culture. For instance, some customers, particularly females, reported that they did not trust organisations sufficiently to feel comfortable sharing their data. They said:

“... I do not trust STC for protecting my data.” (Cu.STC6.F.Q4)
“... due to lack of trust ... so I registered my car under my husband’s name.” (Cu.Toy4.F.Q4)

“... I do not fully trust the bank with all my personal data ...” (Cu.B4.F.Q4)

“My husband shared the data with SAPTCO; it was needed to purchase ticket, I am not fully confident about sharing my data.” (Cu.Sap4.F.Q4)

“In fact, I am not fully confident about sharing my data with Al-Rajhi bank, but I have no option ...”

Some participants pointed out that data confidentiality is a very important issue, prompting them to share data with or withhold data from organisations. They said:

“I am a female; data confidentiality is a very important issue in our culture and society”
(Cu.Toy4.F.Q2.2)

“. . . I will not accept that more data should be shared because this data should be confidential.” (Cu.B5.F.Q4)

“. . . The mobile phone is under my father’s name for several reasons, like data confidentiality . . .” (Cu.STC4.F)
Other participants indicated that organisations should limit access to customers’ data, by ensuring that it is only available to certain employees by imposing strict procedures, as illustrated by the following excerpts:

“... Today, many employees in the bank can easily access my personal data.” (Cu.R3.F.Q5)

“They should have strong data confidentiality procedures, i.e. very strict rules for punishing people who break the rules of data confidentiality.” (Cu.Sap6.F.Q5)

“In other words, there are no restrictions on accessing customers' info” (Cu.R3.F.Q5)

“I am quite confident, but nevertheless the bank should improve its regulation and limit the accessibility of my information to certain employees.” (Cu.R5.F.Q5)

It seemed that sharing personal data, particularly for females, was an issue, as shown by the following responses. These participants said:

“Yes but only the important data. It is difficult for a female in our country to share her data.” (Cu.B6.F.Q4)

“Saudi Culture and society encourages females to keep their personal data private and not share it with others.” (Cu.STC5.F.Q4)
“I am worried if I share my personal data, because of society and our culture, and this could impact negatively the whole of my life.” (Cu.Sap4.F.Q2.2)

It is clear that there are different concepts underpinning the data privacy category. These differences range from lack of trust in the organisations, the sharing of personal data, the absence of data protection rules (which discourage customers from sharing their data), the management of data access inside and outside of organisations, and to the sharing of customer data as an issue due to cultural, societal and religious reasons.

### 6.2.2 Data Quality

Two concepts emerged from the customer interviews: data cleansing and data completion. The respondents’ answers showed that some organisations hold inaccurate data, particularly within regard to females. Indeed, 11 female customers from STC, Toyota and SAPTCO had registered their accounts under their father’s, husband’s or brother’s names as stated in some examples below in the responses to the question “Have you got any services from STC/ SAPTCO/ Toyota under your name? Why/ Why not?”:

“No, the mobile phone is under my father’s name, I do not know the reason, this happened when I was young. But I am thinking to transfer it under my name, but there is no pressure to do that.” (Cu.STC3.F.Q2)

“No, it is under my husband’s name, because it will be difficult to get the service if I register the car under my name. Car insurance, police offices and car dealers have no
female officers to handle my service requests. Finally, this will avoid any accessing of my personal data including my photo.” (Cu.Toy4.F.Q2)

*It was under my husband’s name, I normally order any tickets from SAPTCO through my husband. It is much easier than to issue them under my name. Moreover I do not accept anyone can have access to my data, it is forbidden in Islam and against our culture.”* (Cu.Sap4.F.Q2)

Another female customer stated that the STC holds incorrect customer data and sends erroneous messages to the wrong customers as shown in the following example:

“They send wrong messages because they think I am male since the mobile is registered under my father name. They target the wrong person like sending me the bill for my father’s land line.” (Cu.STC3.F.Q7)

Some female customers from Al-Rajhi and Albilad banks, however, have registered their accounts under their names, although they did not give all their personal data, as shown by the following examples in response to the question “Have you shared your personal data with Al-Rajhi bank? Why/ Why not?”:

“Yes, it is a mandatory to establish a bank account but I limit the data to necessary data.” (Cu.R3.F.Q4)
“Yes, because I need to have my own account, that is why I should give my personal data, but the bank normally accepts limited data about me.” (Cu.R4.F.Q4)

“Yes but, as a female customer, it is cultural issue preventing me from sharing certain personal data with the bank. I normally ask the bank to reduce the number of mandatory fields.” (Cu.R5.F.Q4)

“Yes limited data; but of course not all of my personal data, this is private and nobody would share it with the bank even if I am sure 100% that my personal data will not be misused, because you know I am a woman and as part of our Saudi culture, this data needs to be kept very secret.” (Cu.R6.F.Q4)

In addition, customers of the Toyota Company said that customer data is typically incomplete, in response to the question “In your opinion, did the Toyota Company meet your needs by analysing your attitude? Why/ why not?”:

“... More information is missing or incorrect and I think they should encourage their customers to register their cars under their own names.” (Cu.Toy3.F.Q7)

Another customer of STC confirmed what the Toyota customer regarding data completion in response to the same question had stated. She said:

“No, because they need to focus on data quality and complete the missing data before they can think about analysing the data.” (Cu.STC7.F.Q7)
Although most of the male customers interviewed registered their accounts under their own names, it does not mean that they provided all their data, as illustrated by the examples of their responses to the question “Have you shared your personal data with Al-Rajhi bank/STC/SAPTCO/Toyota/Albilad bank? Why/ Why not?”:

“Yes but not all the data. It is difficult to give all of my data without fully understanding the purpose intention behind collecting the data and the benefits that will be gained as a result of it.” (Cu.R1.M.Q4)

“Yes, but not all the data, because it is a private company.” (Cu.Toy1.M.Q4)

In contrast, some male customers had no issues regarding giving all their data to semi-governmental companies, i.e. companies where government owns the majority of the shares of the company.

“Yes, I have shared all the required data. However, I do not see any problem with sharing my personal data, especially with a semi-government company.” (Cu.STC1.M.Q4)

“Yes, even my revenue. I think it will be beneficial for me and the bank in order to understand each other.” (Cu.STC2.M.Q4)

“Yes, it was necessary to purchase a ticket.” (Cu.Sap2.M.Q2)
It can be concluded from all the interviews there was a lack of data quality, which applied to the majority of the organisations under interview.

6.2.3 Customers' awareness of CRM

The data revealed that there was lack of customer awareness of CRM implementation within the private sector in the KSA. Two concepts identified in relation to this category are CRM benefits and CRM drawbacks. All the customers of the five organisations were unaware of any CRM implementation as shown by the examples below in response to the question, “Have you seen or heard any awareness or advertising by Al-Rajhi bank/STC/Toyota/Albilad bank /SAPTCO to introduce a new concept called CRM?”

“There is no awareness of CRM application. I was shocked about the changes when I complained about the bills.” (Cu.STC4.F.Q9)

“There is no awareness of CRM application.” (Cu.B4.F.Q9)

In addition, most customers lack awareness of CRM systems, which resulted in a lack of understanding of any benefits that could be derived by giving their data. This was ascertained from responses to the question “Are you aware of the benefits of sharing your personal data with STC/Al-Rajhi bank?”:

“No, there are no benefits to sharing my data; in contrast there are disadvantages to it.” (Cu.STC4.F.Q6)
“I do not think there are benefits for sharing personal data.” (Cu.STC6.F.Q6)

“Yes but not all the data. It is difficult to give all of my data without fully understanding the purpose intention behind collecting the data and the benefits that will be gained as a result of it.” (Cu.R1.M.Q4)

Only six individual customers from five different organisations had a limited understanding of the benefits of sharing their data, as illustrated by the following excerpts. They said:

“Sure, there are lots of benefits like customer segmentations. Today, there are no special products for females at Saudi Telecom, while in some banks there are special products, such as a different colour for a female cheque book.” (Cu.STC5.F.Q6)

“Yes, design should meet the category of the customers, such as car colour, design and type.” (Cu.Toy4.F.Q6)

“Yes, they will understand my profile and try to meet my needs.” (Cu.Sap1.M.Q6)

“Yes, any customers' data are important for any organisation to have depth understanding of their customers.” (Cu.B1.M.Q6)

In contrast, some customers believed that there were disadvantages from implementing CRM as stated in response to the question “Have you heard about something called
“Yes, it is a bad system and impacts all STC customers who are paying too much money for their bills because the credit limit was not working for six months after the system went-live in the summer of 2009 . . .” (Cu.STC1.M.Q3)

“Yes, when I faced problems with some services, we found out that STC had implemented a new system called CRM TAWASEL and this system has a negative impact on our mobile services.” (Cu.STC2.M.Q3)

6.2.4 Policies and Procedures

Based on the data, it appears that the country and its organisations lack certain rules and procedures for protecting customers’ data, providing satisfactory services for all their customers regardless of their gender, managing legality issues faced by some customers (especially females who register their accounts under the names of related males) and encouraging customers to share their data. As a result, organisations hold inaccurate and incomplete data of their customers. Two concepts emerged in relation to this category: female services and legality. As shown in the next excerpt, a customer from STC mentioned that there were some services unavailable to females, like roaming (to use your cell phone abroad) without a sponsor. She said:

“… There are some services not available to females like roaming without a sponsor.”

(Cu.STC4.F)
The next two excerpts from an STC customer and a Toyota customer revealed that lack of female services discourages females to register their accounts using their own names. They said:

“... the mobile phone is under my husband name, because, it will be difficult to get all the services easily e.g. regardless of your credit history, if you are female customer, you can’t increase the credit limit, unless you have a man as a sponsor. A friend of mine asked her driver to be her sponsor to increase her credit limit.” (Cu.STC5.F.Q2)

“... I bought the car under my father’s name, because, with the absence of female sections, it is so difficult to deal with any traffic problems, such as accidents or any requirement for insurance company involvement.” (Cu. Toy5.F.Q2)

Another customer from the Toyota Company confirmed missing services for females explicitly by giving examples, which appear in the following excerpts. The customer said:

“...There are many services missing for females.” (Cu.Toy3.F.Q2.1)

“... Although women are not allowed to drive and normally a woman sits in the back seat, most of the accessories, such as controller for air condition and radio are in the front seat.” (Cu.Toy6.F.Q2.1)

“... For example car colour is more suitable for males than females.” (Cu.Toy4.F.Q2.1)
Some restrictions are in place with respect to SAPTCO Company services for females travelling alone, as stated in the excerpt below:

“... As I mentioned basic needs and requirements are not provided by SAPTCO. Moreover, you have to travel with a man who is part of your family.” (Cu.Sap5.F.Q2.1)

In addition, customers' responses showed that there is an absence of sales and services for females, i.e. no offices in organisations like the police and insurance companies and only a few offices in other organisations, such as STC and SAPTCO. It can be seen from the following excerpts, that female customers of the Toyota Company register their cars under their father or husband’s name due to the unavailability of physical service offices for females in the police, car insurance or at car dealers. They said:

“No, I bought a car under my father’s name, due to any traffic problems or any involvement for car insurance company. All the services mentioned should be conducted by males, because there are no physical offices for females in the police or the insurance company.” (Cu.Toy3.F.Q2)

“No, it is under my husband’s name because it will be difficult to receive services, if I register the car under my name. Car insurance, police offices and car dealers have no female offices to handle my service requests. Finally, this will avoid accessing of my personal data including my photo.” (Cu.Toy4.F.Q2)
Moreover, female customers from STC and Albilad commented that there are few sales and physical service offices for females. A female participant said:

“… Moreover, there are few physical service and sales offices for females in STC.”

(Cu.STC5.F.Q2)

“… Also, there are no female branches of Albilad bank near to my area …”

(Cu.Sap5.F.Q2)

In the next two excerpts, two customers from SAPTCO and Toyota confirmed that there were no special sales and service offices for females. Two female participants said:

“No. Although women are not allowed to drive and are regular customers of public transport, SAPTCO did not have sales offices for females” (Cu.Sap4.F.Q2.1)

“… There are no customer service offices for female.” (Cu. Toy5.F.Q2.2)

Legality for accessing, sharing and managing customers' data without the customer’s permission is a concern of some organisations’ customers, as illustrated by the following two excerpts taken from interviews within customers of Al-Rajhi bank and STC. They said:

“In fact, I am not fully confident about sharing my data with Al-Rajhi bank but I have no option. Today, many employees in the bank can easily access my personal data.”

(Cu.R3.F.Q5)
“Not sure. I heard of many cases of other people whose personal data has been sent to other commercial companies without their permission. Thus, it is very difficult to be confident about sharing your personal data.”

(Cu.STC7.F.Q5)

It is apparent that the lack of female services and legality is affecting customers and the sharing of their personal data with organisations, which impacts CRM effectiveness.

6.2.5 Customer needs

Data analysis shows that two concepts were identified in relation to this category: customer involvement and customer segmentation. None the customers of the five organisations interviewed were invited to any survey or discussion regarding their further needs and requirements. Their responses were 'No' to the questions “Have you been invited by the STC/SAPTCO/Albilad bank/Al-Rajhi bank/Toyota to explain future needs and requirements?”.

The next set of excerpt examples revealed that there was a lack of customer segmentation in response to the questions “In your opinion, have STC/SAPTCO/Albilad bank/Al-Rajhi bank/Toyota met your needs by analysing your attitude? Why/ why not?”

“No, there are many needs that have not been met by Al-Rajhi bank, especially for female customers.” (Cu.R6.F.Q7)
“No, the company is behind regarding meeting my needs. A simple example is that I have used their website for a long time, yet they never send me offers via e-mail.”
(Cu.B2.M.Q7)

“There continues to be a gap between what the bank offers and my needs.”
(Cu.B1.M.Q7)

6.2.6 CRM success measurements

The respondents expressed their feelings about the CRM implementations within each of the five different organisations. Their responses tended to focus on three concepts: customer satisfaction, customer services and customer turnover. Three customers of STC indicated a negative impact for CRM implementation in that it causes low customer satisfaction, sluggishness in customer services and an increase in customers churn, as exemplified by the following excerpts. They said:

“I think it is a negative impact, the bill is increased, customer satisfaction is decreased, and customer services were slow.” (Cu.STC1.M.Q10)

“There was definitely a negative impact; look how many customers move to other operators after CRM implementations.” (Cu.Toy1.M.Q10)

In addition, a customer of Toyota confirmed that there is a slowing down of customer services. He said:
“Negative impact i.e. many problems happened immediately after the implementations like slowness in response of customers’ services.” (Cu.Toy3.F.Q10)

There was, however, fourteen different customers within the five organisations who commented that there were no noticeable changes after CRM implementation as shown by examples below when they said:

“There are insignificant changes.” (Cu.Sap2.M.Q10)

“There are no noticeable changes after CRM implementation. In addition, most of the customers including me are not aware that the CRM concept has been implemented.” (Cu.Toy2.M.Q10)

In contrast, five customers of the Al-Rajhi bank and one customer of the Albilad bank admitted to positive changes as shown in the excerpts examples below. They said:

“In general, there are more branches and quicker services in phone and AVR channels.” (Cu.R2.M.Q10)

“Yes, in general, there are changes like account transaction notifications via SMS, i.e. the customers will be notified immediately via SMS regarding any changes in their accounts. This is a positive change.” (Cu.R3.F.Q10)
6.2.7 Customer Culture

A set of concepts were identified that related to customer culture, societal norms, religion and the accessing of stored female data by males. All of these concepts represent concerns within the culture of the organisations' customers. Customers' responses show how societal norms, religion and the accessing of females' data by male employees affect how honestly customers give their personal data to organisations. This impacted on CRM implementation effectiveness. Societal norms were one of the major drivers that prevented customers from sharing their personal data with organisations, as explained in the excerpts examples below:

“I think it is more a social problem than a religious one, i.e. . . normally these tasks are done by males.” (Cu.STC6.F.Q2.2)

“I am a female; data confidentiality is a very important issue in our culture and society.”
(Cu.Toy4.F.Q2.2)

“I am worried if I share my personal data because in our society and culture this could impact negatively on the whole of my life.” (Cu.Sap4.F.Q2.2)

“Yes, but as a female customer, it is our society that is preventing me from sharing some personal data with the bank. I normally ask the bank to reduce the number of mandatory fields.” (Cu.R5.F.Q4)
Religion is another reason that prevents customers giving their data, as revealed in the following examples when this participant said:

“It was under my husband’s name, I normally order any tickets from SAPTCO through my husband. It is much easier than to issue it under my name. Moreover I do not accept anybody can have access to my data; it is forbidden in Islam and is against our culture.” (Cu.Sap4.F.Q2)

Advice from a female customer of STC is that there should be a FATWA (which is a religious opinion concerning Islamic law issued by an Islamic scholar) in order to clarify the position of females in terms of providing their personal data to a private company. She said:

“...There should be a FATWA to clarify the issue of ID cards, as well as giving personal data by females to private companies.” (Cu.STC3.F.Q4)

A scholar’s viewpoint, therefore, was sought. He stated that nothing in Islam prevented females from sharing personal data with organisations provided there is a data privacy regulation, as shown by the extract example below. He said:

“...In contrast Islamic religion encourages anything that helps the people to simplify their life. Big companies will be responsible by Sharia law to protect the personal data of customers.” (Org.Islamic.Q1)
Collecting a female’s photograph is not an excuse for an unwillingness to share personal data with a company, as stated by scholar in Islam in the following excerpt, when he said:

“I think she can delete the photo and give information, I do not think companies like to keep a customer’s photo. Anyway this should not excuse her from giving her data.” (Org.Islamic.Q2)

The subsequent quotations show that the probability of male employees accessing female data leaves them reluctant to share their personal details. A number of female participants said:

“No, it is under my husband’s name because; . . . Finally, this will avoid accessing of my personal data, including my photo, by male employees.” (Cu.Toy4.F.Q2)

“Yes, the mobile phone is under my husband’s name. The reason for this is that it is normal for all services to be under the male name, meaning this will be easier and nobody will break the confidentiality of your personnel data, including your photo and other things.” (Cu.STC6.F.Q2)

“Yes, but there is limited personal data, it is mandatory to give some data so I gave them only this data because I do not fully trust the bank with all my personal data and part of our culture is that female data should be kept secret.” (Cu.B4.F.Q4)
“Yes limited data; but of course not all of my personal data, this is private and nobody would share it with the bank even if I am sure 100% that my personal data will not be misused, because you know I am a woman and as part of our Saudi culture, this data needs to be kept very secret.” (Cu.R6.F.Q4)

A participant of SAMA described the difficulty of limiting the access of female data to only female employees, when he said:

“Yes, banks should limit the access to customer data for certain employees and this applied in the banks. However, most of employees in the banks are men so it is difficult to limit access of female customers’ data for only female employees.” (Org.SAMA.Q1)

6.3 The Outcome of the Analysis Based on the Organisations’ Perspectives

Eleven categories were identified from an analysis of twenty interviews covering the five organisations. Additional interviews with SAMA, the telecom regulator and an Islamic scholar were needed to answer some of the questions which emerged. These interviews are analysed in the following eleven subsections.

6.3.1 Business-Driven

The analysis of the data shows that five concepts were identified in relation to this category; CRM project vision, building a business case, business sponsorship, set business priorities, and business needs and requirements. IT professionals led the CRM implementation for STC. There was not much involvement from business people. As a result, there was a lack of clarity in CRM’s vision, a lack of business priorities, the
absence of a solid business case to support budget allocation and uncompleted business needs and requirements. For instance, an participant from STC pointed out that the CRM vision was not clear from the outset because there was too little involvement from business as revealed in the below excerpt when he said:

“Since we are not leading the project, aligning the project vision with the business vision did not happen due to there being less business influence at the beginning of the project.” (Org.BS.STC.Q11)

In the cases of the Albilad and Al-Rajhi banks, evidence was found to exist for a clear project vision that was developed before starting the CRM project when a participant said:

“Yes, the project vision was developed before starting the CRM project and was based on the business vision.” (Org.PD.B.Q16)

“The project vision is to implement CRM systems to help businesses in their vision, which is to move from a product–centric to a customer–centric perspective and this was clear from the top management and the business people.” (Org.PM.R.Q8)

Building a business case was crucial in achieving the required budget and support, as stated by the project director of Toyota in the following excerpt when he said:
“Allocating the needed budget was not so difficult due to a clear business case and that was supported by the business...” (Org.PD.Toy.Q8)

The absence of a business case for STC caused difficulties in allocating the needed budget and support from top management, as mentioned by the business support head of STC in the following excerpt when he said:

“... The STC board of directors requests a clear business case in order to approve the budget and because the business was not in the picture at that time, IT had a difficult time allocating the required budget.” (Org.BS.STC.Q3)

Business sponsorship was a very critical factor in simplifying some important tasks and activities, such as finalising business requirements and system acceptance, as stated by the business and IT organisations’ participants at the Albilad bank and Toyota in the following examples when participant members of these organisations said:

“Since the business led the project, we had the participation of two dedicated excellent business analysts from business sector, with help from an external consultants to finalise the business requirements and build the business process of customer care from scratch.” (Org.CC.B.Q3)

“...Having the sponsor from the business helps to encourage and get the commitment from the business for the project...“ (Org.PD.Toy.Q5)
Conversely, at STC, the Al-Rajhi bank and SAPTCO, there were no personnel playing a sponsorship position in the project and this caused many barriers, such as the slow allocation of the required budget and the difficulty in obtaining approval for the business requirements and project plan, as described by the following examples when participant members of these organisations said:

“... The STC board of directors requests a clear business case in order to approve the budget and because the business was not in the picture at that time, IT had a difficult time allocating the required budget.” (Org.BS.STC.Q3)

“...Because we are as a business not fully in the picture. IT people never communicate the issues in the early stages so we can help to convince the CEO to change the plan. As a business, we are the revenue generators in our company, and our voice is always acceptable to upper management, particularly the CEO.” (Org.BS.STC.Q8)

“Frankly speaking, IT was working alone in preparing the RFP and once it was completed, they asked us to review it in two weeks. In addition, we are the sponsor of the project, but in reality we are not. Most of the important decisions in the project have been taken without our direction. As a result there was less trust between us and the IT PM during the whole project period. ... “ (Org.CC.R.Q7)

“The project plan was not approved by the business, and they are the customer and the people who will operate the systems and benefit from it. As a result, the business strongly resisted accepting the system.” (Org.PD.SAPT.Q14)
Interestingly, a project member of SAPTCO stated that a lesson learned was that businesses should lead during the early stages and IT should take over at the design stage, as shown by the excerpt below:

“Business needs to lead at the beginning stages to create the requirements, and then IT should be leading during the design and construction phases.” (Org.PM.SAPT.Q5)

Setting business priorities was a business task with the purpose of phasing the implementation and reducing the risk, as stated by participants from STC and Al-Rajhi bank when they said:

“At the beginning, the CRM team found out that there were no clear objectives and priorities from the Mobile sector. Therefore, the CRM team set up lots of meetings with business people to clarify the objectives and priorities. As a result, the CRM team has agreed that in order to minimise the risk for the implementation, projects need to be split into three phases: the ‘Quick Wins’ sales and marketing phase, the prepaid customers phase and the post-paid customers phase.” (Org.PD.STC.Q13)

“Yes, we did set up the measurable goals and metrics and these are connected to key business indicators; we had asked the project manager to align them with project objectives but they said it was too late For instance, we had prioritised the marketing module as the first phase ....” (Org.CC.R.Q2)
The head of customer care at SAPTCO gave his advice following CRM implementation, stating that business should start by considering the more painful areas, as shown by the following excerpt:

“First, business should set the priority, which is assumed to be the most painful area.” (Org.CC.SAPT.Q2)

Having business people to lead the preparation and to finalise their requirements was useful, as stated by the participants from Toyota and the Albilad bank in the excerpts below. They said:

“...Having the sponsor from the business helps to encourage and get the commitment from the business to finalise the requirements; then we can start to design the application based on the requirements ...” (Org.PD.Toy.Q5)

“Since the business led the project, we had participation from two dedicated excellent business analysts from business sector with help from an external consultants to finalise the business requirements and build the business process of customer care from scratch.” (Org.CC.B.Q3)

However, having business finalise the requirements while they are engaged with other matters will reduce the accuracy and the completion of the requirements, as stated by the participant from the Al-Rajhi bank when he said:
“Business is too busy with their operations to serve their customers, however Project Management ask us to provide our requirements in a very short time; we had tried to prepare full and accurate requirements and they were aligned with the CRM vision. This caused a delay in providing such requirements in the given time...”

(Org.BM.R.Q7)

Another impact upon the accuracy and the completion of the requirements could be shortage of resources for gathering them from business as was said by the participant from STC in the excerpt below.

“... Also project management as well as the system integrator were affected by a shortage of resources to handle parallel workshops at a high quality. As a result, there were so many challenges, like inconsistencies or missing business requirements ....”

(Org.PD.STC.Q15)

A participant from the Albilad bank showed how important the business's needs and requirements are by using them to measure the success of CRM implementation, when he said:

“The success of CRM implementation is meeting businesses' needs and requirements.”

(Org.BM.B.Q1)
6.3.2 Project Management

The data revealed that there is a need for good project management skills and qualifications in order to obtain agreed and approved project plans. This requires the collaboration and commitment of all project stakeholders and probably phasing the project implementation to overcome the risk of having different systems integrated within a specific deadline. The six concepts related to this category are integration, project planning, a phased approach, collaboration, the project management team's qualifications and skills, and minimising the customisation of the CRM application. Eight participants, from both IT and business within the Al-Rajhi bank and Toyota, considered integration to be a big challenge, as apparent from the following excerpts when they said:

“In addition, integrations with the core banking systems were difficult due to different platform and overlapping functions between the two systems.” (Org.PD.R.Q15)

“As I said in the beginning, integration was a big challenge in our project. We had many applications needing to be integrated with CRM, and these applications had different platforms and technology, which make it so difficult to integrate with them ...” (Org.PM.Toy.Q6)

Managing project plans and meeting deadlines was an issue for all five organisations for many reasons, such as the complexity of integrating different systems, changing business requirements and the lack of experience on the part of the project management’s office team, as shown by the following responses.
“There was a big delay in this project. It had been planned for it to be completed within 16 months by the integrator. Each month’s delay in the project led to more delay because of new requirements for new services or products. There were many reasons for the delay, such as the inexperience of the project management office staff leading to poor project plan expectations, less commitment from other systems to the integration date proposed in the project plan, and underestimation of the complexity of the project from the integrator.” (Org.BS.STC.Q7)

“No, the project has been delayed for more than a year due to bad project management, and less empowerment of the business for the project. For instance, the project plan was not agreed or approved by the business. Moreover, the project plan was not reliable since it was not updated regularly.” (Org.CC.R.Q14)

“Obtaining an agreed project plan for the integration with other existing systems inside the bank was a big challenge, because every system has its own project plan and priorities and to agree on one project plan for the integration was impossible.” (Org.PM.B.Q5)

“Yes, Oracle was involved and they reviewed the project plan but the delay was internal because of new business requirements.” (Org.PD.Toy.Q12)

“No, the project has been delayed for more than six months because of bad project plan estimations from the project management office.” (Org.CC.Toy.Q3)
Participants from the Al-Rajhi bank, the Albilad bank and Toyota pointed out that a phased approach was used to reduce the risk, give the business more time, manage the shortage of resources and enable buy-in from the business by showing some functions of the production in a short period, as shown by the excerpts below:

“... The project manager and integrator agreed in the mitigation plan to have the project in phases; customer care, then marketing and finally the analytic phase.”
(Org.PD.R.Q13)

“Since the business had not given enough attention to the project, we as the project management team and the systems integrator were working together to minimise the risk of the slowness of business engagement. We had found that the phases approach would minimise the risk, give the business more time, and enable buy-in from the business by showing the customer care module in the production in a short time...”
(Org.PM.R.Q5)

“... Due to the time limitations, it has been decided to split the project into three phases. Basic functions for the first phase were sales, customer care and marketing without integration. The second phase was to integrate with other systems and the last phase was to complete the remaining functionalities and analysis.” (Org.PD.B.Q4)

“Yes we have implemented the project in phases, where phase one was the CRM strategy, phase two was Unified Customer Master Profile, basic call centre marketing and dealers and phase three was more advanced functions and analytics.”
(Org.PD.Toy.Q13)
In STC, although, the project was divided into three, a phased approach was not applied to deploy these projects. In contrast, extra resources were sourced from the system integrator, business and IT departments to meet the different project developments. Moreover, multi-development, testing and training environments were required to meet the different project developments. Because of this parallel development, the risk of failure was increased, as seen by the following excerpts when this participant said:

“In fact the project management office were not playing the right role: they should show the risk of doing things in parallel sooner to upper management. In addition, the project management office does not have enough experience to realise the risk in the early stages and communicate it at the right time to upper management.” (Org.PM.STC.Q2)

“No, because of the following: there were three different projects running in parallel; the project management office did not have enough experience to make early judgements on the project plan; and there were about 36 integrations without priorities with business people, which is the project management office’s responsibility and was a big risk.” (Org.PM.STC.Q4)

Collaboration among all CRM project stakeholders was missing in the STC and the Al-Rajhi bank, which caused a delay in the project’s implementation. Different organisations’ participants noted this when they said:
“Team work is missing from the project team members and also with other stakeholders outside the five project streams. In addition, enforcement and punishment, rather than encouragement and support, were the main issues for the IT and head of business meetings…” (Org.PD.STC.Q19)

“I am not sure but business thought they had power in the company and should not be led by IT people; this thought caused lots of bad communications between the project management team and business people. Most of the communications started with emails and never got replies from the business on time – many calls and follow-up emails were required to get a response. Meetings, letters and texts messages were also used as mediums for communication. These communication types were agreed and approved by the project management team in an early stage of the project until the end of the project.” (Org.PD.R.Q12)

“Unfortunately, the project did not finish on time; there was a delay for a year due to low cooperation from other stakeholders within the organisation.” (Org.PM.R.Q1)

The project management team’s qualifications and skills proved very important when dealing with the different challenges during the period of the project. These challenges included, for example, obtaining a good estimation of the project plan, managing the system’s integration, dealing with business involvement and support and getting the commitment of IT people for other systems’ integration. Different participants from STC and the Albilad bank noted this when they said:
“...The project management office received the project plan from the integrator and has not expressed their comments on the plan due to inexperience of their staff for such a project.” (Org.PM.STC.Q3)

“The project has not finished on time because of the following: three different projects were running in parallel, the project management office team have not got enough experience to make early judgements on the project plan, and there were about 36 integrations without priorities; involving business people, which is the project management office’s responsibility.” (Org.PM.STC.Q4)

“... Poor estimation by the project management of the efforts needed to complete the integrations cause a delay in the project.” (Org.PD.B.Q10)

Minimising customisation by changing the business process to fit the solution was an important issue demonstrated by the Albilad bank. This had an impact on their customers’ services, as shown by the following examples:

“Since the business led the project, we had participation from two dedicated excellent business analysts from business sector with help from an external consultants to finalise the business requirements and build the business process of customer care from scratch, based on the Siebel business process.” (Org.CC.B.Q3)
“Since we were a green field, it was decided to implement out-of-the-box functionality (95%) from the Seibel CRM product, with minimum customisation. We relied on the business process that had been built during the early stages of the project.”

(Org.CC.B.Q10)

In contrast, more customisations and less change to the business process were carried out by Toyota and STC, as illustrated by the following excerpt when these participants said:

“We did stakeholder analysis to identify our team that would be working on the project. This team could be part-time or full-time. Having a sponsor from the business helped to encourage and get the commitment from the business for the project. After that we gathered the requirements for the business; we started designing the application based on the requirements. We did quite a lot of customisation to fulfil the requirements, which was not recommended by Oracle (the application owner).” (Org.PD.Toy.Q4)

“Our plan was to change our business in order to be aligned with the CRM solution, but this did not happen due to the inexperience of the system integrator and the unavailability of some business requirements of the CRM application.” (Org.PD.STC.Q38)

“The Oracle company review report revealed that we were making about 50% above average customisation. It showed that we are in the process of changing the application to be aligned with our business. This change was less hassle than the change in our business process.” (Org.PD.STC.Q39)
6.3.3 Technology

A set of concepts was identified from within technology. These were software selection, vendor experts, external consultants and systems integrator selection. All of these concepts represent concerns with technology. The responses made by the organisations’ participants showed organisations used similar mechanisms to select software suitable for covering their needs and requirements. The selection process involved the use of an external consultants to assure quality and choice of the right system integrator by utilising vendor expertise to guarantee the integrator’s capabilities and assure the quality of the work.

Software selection was one of the important factors; the focus of which was concentrated on selecting the leading software in the market that was capable of meeting most of the business’s needs and requirements. The interviewees from STC and Toyota explained this when they said:

“Many things have been used for software selection, such as consultant reports from Gartner and Meta-Group, cross-checking details between our requirements and the available software functions and benchmarking within telecom companies.” (Org.PD.STC.Q30)

“Yes, we did benchmark the software and use the consultant company Magic-Quadrant report to select the leading product in the market.” (Org.PD.STC.Q29)

“The evaluation has been done by involving a team from inside and outside the organisation and using worldwide evaluation reports produced by Gartner and
Forrester consultancy companies to select the leading solution in the market, which was the Siebel product.” (Org.PD.Toy.Q2.1)

The vendor’s expert role was crucial for developing the Request for Proposal (RFP), evaluating the system integrator’s responses for the RFP, reviewing the project plan and auditing the system integrator’s work as stated by different participants from Toyota, theAl-Rajhi bank and SAPTCO. They said:

“Yes, Oracle was involved and they reviewed the project plan but there were internal delays because of a new business requirement.” (Org.PD.Toy.Q12)

“Yes, Oracle expertise was involved as an audit for the system integrator’s work.” (Org.PD.Toy.Q14)

“There was an evaluation team composed of the business department (sales, customer care and marketing), IT people, a project management team, the procurement department from inside the bank and two Oracle experts as external consultants from outside the bank.” (Org.PD.R.Q6)

“The overall project timeline was estimated by the top management and based on that the system integrator gives a detailed project plan. After that Oracle was involved in reviewing the project plan before top management approval was given.” (Org.PM.SAPT.Q2)
The following excerpts are examples given by organisations’ participants from STC, the Albilad bank, Toyota and SAPTCO, which reveal that external consultants played a major role in integrator selection, finalising business requirements, developing business processes and building a customer-centric strategy.

“Yes, there was a big evaluation team representing all the stakeholders (all the departments who were going to benefit from the systems) and the GIZA Systems company were involved as external consultants who were going to help STC in the evaluation.” (Org.PD.STC.Q7)

“A team has been assigned from different departments to do the evaluation with participation from an external consultants company, called ‘Dev-team’.” (Org.PD.B.Q7)

“Since the business led the project; we had participation from two dedicated excellent business analysts from business sector with help from external consultants to finalise the business requirements and build the business process of customer care from scratch.” (Org.CC.B.Q3)

“... In addition, we had issued the RFP but before that, we had worked with consultants to develop a CRM strategy and based on that we had developed the RFP with help from Oracle. Then RFP had been issued and after that the evaluation had been started with engagement from the external consultants and Oracle expertise. ...This was very useful for project management.” (Org.PD.Toy.Q2)
In SAPTCO, external consultants were excluded from the financial evaluation, as presented in excerpt below:

“Yes, the financial evaluation was done via only the top management and procurement people. Neither consultants nor the business was involved in the financial evaluation.” (Org.PD.SAPT.Q8)

The last concept of the technology category is systems integrator selection, which was a very significant factor in assuring its capability and accountability for successful CRM implementation, as revealed by the project director of STC in the two excerpts below:

“After issuing RFP to selected system integrators, STC created criteria for evaluating system integrator responses, and after that two to three companies were short listed for financial evaluation. Finally, the system integrator who showed more commitment and a reasonable price was the winner of the contract.” (Org.PD.STC.Q27)

“Yes, there was a big evaluation team representing all the stakeholders (all the departments who were going to benefit from the systems) and the GIZA Systems company was involved as an external consultants who was going to help STC in the system integrator evaluation.” (Org.PD.STC.Q7)

### 6.3.4 Top Management Commitment

Three further concepts emerged from the interviews with the organisations: budget, resources and support. The answers given by respondents within the five organisations
showed that top management commitment was essential to facilitate the allocation of the required budget that involved the right resources, and getting the needed support. The project directors of STC, the Al-Rajhi bank and Toyota demonstrated their experiences of allocating the required budget for the CRM project. In STC with the absence of a business case and the lack of support from the business, allocating enough of a budget for the CRM project was a big challenge, as stated by project director in the excerpt below when he said:

“It was so difficult to convince the STC Board of Directors to allocate the required budget with the absence of a business case. However, the IT people pushed hard to get the approval. IT gave seven presentations during one year to the board of directors to get a budget allocation approval. In the end, the board of directors approved the budget with a deduction of 50% with a recommendation to invite Indian integrator companies. This was a bad recommendation as it excluded the leading integrators like Accenture, Bearing Point and Cap Gemini due to the limited budget.” (Org.PD.STC.Q5)

In contrast, budget allocation was not an issue with the Al-Rajhi bank since there was full commitment and support from top management for CRM implementation, as explained by the project director in the following example:

“Since the decision has been made by top management to implement CRM and go ahead with the Oracle proposal, getting the required approval and allocating the required budget was not difficult.” (Org.PD.R.Q2)
Developing a clear business case and getting the needed support from business was helpful in convincing the top management of Toyota to approve the required budget, as stated in the excerpt below:

“Allocating the needed budget was not so difficult due to a clear business case, and that was supported by business, which was used to measure our success in the CRM project.” (Org.PD.Toy.Q8)

The quality of the system integrator’s resources was a major issue during all the stages of the project’s implementation, impacting on the success of the CRM projects within all the five organisations, as stated by the project directors in the following excerpts when they said:

“After a long evaluation and short-listing, TCS systems-TATA won the deal to implement CRM Systems for the Mobile Sector. TCS had been given 16 months to finish the implementation, including two months for team mobilisation. Unfortunately, STC found that 90% of the resumés of the TCS resources in the proposal had been changed to less experienced people.” (Org.PD.STC.Q9)

“Yes, high-quality integrator resources were a challenge. We pointed out our feedback on some resources in the early stages but they have not taken action to replace them ...” (Org.PD.R.Q10)
...In fact, resources are a challenge everywhere. However, our mitigation was to review the resumés ahead but this was not enough.” (Org.PM.B.Q2)

“The quality of integrator resources was a big issue impacting the quality of the work and project timeline.” (Org.PD.SAPT.Q10)

The quality of software owner resources was also an issue, as pointed out by the project director of Toyota when he said:

“As Oracle-qualified resource availability was low in the region, we faced a quality issue with vendor resources but top management commitment was strong, which helped to make sure the vendor was focused on mitigating the issue.” (Org.PD.Toy.Q7)

A lack of project management resources affected the timeline of the project and the quality of the work, as shown in the excerpt below:

“... Also project management as well as the system integrator were affected by a shortage of resources, making it hard to handle parallel workshops at a high level. As a result, there were many challenges like inconsistency or missing business requirements...” (Org.PD.STC.Q15)

Although the STC project management failed to convince its top management to change the integrator due to the resources issue, they tried to hire people directly and apply
penalties against the integrator but it seems that neither approach worked, as stated in the following two excerpts.

“Since bureaucracy is the management style at STC, fixing the integrator resources issue by changing the integrator was a very difficult decision. It was a political decision because you need to convince the CEO. The other option was hiring people through us but that did not work because these resources found resistance from the integrator team.” (Org.PD.STC.Q11)

“The system integrator struggled to mobilise the right resources on time; STC applied the penalties against the system integrator.” (Org.PD.STC.Q19)

Top management support is crucial for overcoming obstacles during CRM project implementation, such as having a dedicated team, building, infrastructure and budget. Moreover, there is a need to push people inside and outside the company, including the system integrator and the software owner to give full commitment to the project, as illustrated by the project directors of STC, the Al-Rajhi and Albilad banks when they said:

“...In addition, the CEO has signed a decree to provide a dedicated building with all the facilities for the project team. Moreover, a dedicated over-time budget was allocated for the project team.” (Org.PD.STC.Q13)
“To tackle the challenge of the slowness of the integrator team mobilisation, top management gave the green light to apply penalties and to start talking to the second short-listed company who bid for the project; this was big pressure on the integrator to mobilise the team ...” (Org.PD.R.Q9)

“At the beginning we faced difficulties in having a dedicated team for the project but after lots of support from upper management, we succeeded in having 8 full-time employees, where 4 were from IT and 4 from business.” (Org.PM.B.Q2)

There, however, were some issues where the project management was not getting enough support from the top management, such as changing the system integrator, as stated by the project directors of STC, the Albilad, and Al-Rajhi banks:

“Since bureaucracy is the management style at STC, changing the integrator was a very difficult decision. It was a political decision because you needed to convince the CEO. The other option, that was hiring people through us, was applied but it did not work because those resources found resistance from the integrator team.” (Org.PD.STC.Q11)

“Yes, we communicated with the top management but they were busy with other issues in the bank and never gave the needed support.” (Org.PD.B.Q13)

“Yes, we communicated the risk mitigation plan every week to all the members of the project higher committee and we were including it in the presentation of the monthly meetings but the required support was weak.” (Org.PD.R.Q17)
6.3.5 CRM Success Measurement

The respondents commented upon their experiences after CRM had been implemented by the five organisations. Their responses tended to focus on five concepts: increase in customers, customer turnover, customer satisfaction, meeting business objectives, and finishing the project on time and on budget. Participants from the Al-Rajhi and Albilad banks, Toyota and STC confirmed what organisational customers had stated, which was that successful CRM should be measured by customer turnover and satisfaction, and by the increase in customers. This was described in the following excerpts:

“The main aim of implementing CRM is to help in customer retention, satisfaction and increase.” (Org.PD.R.Q1)

“In my opinion measuring the success of CRM should be tagged to external customers, like how many customers increased, were retained or were satisfied after the CRM implementation. Having other measurables will be meaningless.” (Org.PD.B.Q1)

“Regarding us in this project ... customer satisfaction needs to be measured before and after CRM application, because CRM is the 360 degree view for our customers.” (Org.PD.Toy.Q1)

“...The main aim of CRM implementation is to understand more about STC customers and achieve the following objectives: gain new customers, retain existing customers and increase customer satisfaction.” (Org.PD.STC.Q1)
Different participants from IT and business in STC, the Al-Rajhi and Albilad banks and SAPTCO believe that meeting business requirements and completing the project on time without exceeding the budget is the main measure of success for CRM projects, as participants explained in the following examples:

“It is simple, successful CRM implementation means we meet project objectives on time and on budget.” (Org.PM.STC.Q5)

“Achieving the business objectives and requirements should be the measurement for successful CRM implementation.” (Org.MB.R.Q1)

“People have different opinions. However, from my point of view, meeting business objectives with minimum slippages in program time and budget could be the success.” (Org.PD.STC.Q20)

“The success of CRM implementation is to meet businesses’ needs and requirements.” (Org.BM.B.Q1)

### 6.3.6 Customer needs

The responses of participants from organisations confirmed customers' responses about the absence of customer involvement and lack of segmentation, i.e. no direct workshop to confirm customers’ needs and requirements with the result that segmentation into customer groups was very limited. Customer involvement and customer segmentation are two concepts that were identified in relation to the customers’ needs category. It can
be seen from the following excerpts from STC, the Al-Rajhi bank, the Albilad bank, Toyota and SAPTCO that all the five organisations did not directly involve their customers in gathering information:

“Of course, customer inputs are very important in determining requirements. So the lack of customer participation was negative.” (Org.BS.STC.Q1.2)

“Through surveys we did include customer feedback and opinion. However, there was no direct contact or workshops with customers to collect their requirements.” (Org.CC.R.Q4)

“Frankly speaking, we did not consider customer opinion. We were following the marketing consultant company to build our requirements and products.” (Org.BM.B.Q4)

“We did not take customers’ feedback.” (Org.BM.Toy.Q3)

“No, we thought there was no need to have direct contact with the customers.” (Org.CC.SAPT.Q2)

The Al-Rajhi bank, however, sought some customer feedback via a survey. A business participant illustrated this when he said:
“Through surveys we did include customer feedback and opinion. However, there was no direct contact or workshops with customers to collect their requirements.” (Org.CC.R.Q4)

In addition, due to the quality of customer data, customer segmentation was very weak in the Al-Rajhi bank, Toyota and SAPTCO, as described by the excerpts below:

“Yes, customer segmentation was for a few criteria, like account balance, to distinguish between valuable and non-valuable customers. We did not trust our data, so we found it difficult to segment our customers based on that data.” (Org.BM.R.Q5)

“Yes, customer segmentation was for very limited criteria, we are planning to cover all the criteria soon.” (Org.CC.R.Q8)

“Because the quality of our data was low we failed to segment our customers. This is very important, but customer profiles need to be understood first and this relies on the quality of data that we have these days.” (Org.CC.Toy.Q2)

“Due to the bad quality of customers’ data, categorising our customers based on their profile was difficult without cleansed and complete customers’ data.” (Org.BM.SAPT.Q1)
“There was no customer segmentation because not much data is kept about our customers, but we are working to cleanse and complete customers’ data to segment and target them for new services.” (Org.CC.SAPT.Q1)

6.3.7 CRM Awareness

The data revealed that there is a lack of end-user involvement and customer awareness, as stated earlier in the customers' interviews. End-user training and awareness, however, was applied before the CRM systems went into a production environment in all five organisations. The CRM champion's concept was used within most of the five organisations. In all, four concepts were identified in relation to this category, which are end-user involvement, customers' awareness, end-user awareness and training and CRM champion.

Most of the organisations’ participants acknowledged a delay in end-user involvement in the CRM project within all five organisations, as shown by the following examples from IT and business interviews.

“In summary, business gave less attention to the project at the beginning stage.” (Org.PM.R.Q2)

“... Limited people involved from the business make it too hard for them to attend many workshops.” (Org.PD.STC.Q15)
“Although end-user involvement was late, HCL (external consultants company) set up a champion team to increase the buy-in and awareness for the project within their department and the people below them.” (Org.PM.Toy.Q5)

“After that he had discussed with the business obtaining their sponsorship for the project, but the business is totally busy with lots of other activities and lost interest since they were not involved from the beginning.” (Org.PD.SAPT.Q11)

The participants from all five organisations confirmed lack of customer awareness of CRM implementation, as shown by the excerpts below:

“We had not had any announcements about the CRM project to our customers.” (Org.BM.B.Q12)

“No, we did not do any awareness-raising for the customers about CRM.” (Org.BM.Toy.Q5)

“...we did not think that it was important to introduce CRM to our customers but now I think it is very important.” (Org.BM.SAPT.Q4)

In contrast, there was end-user awareness and training, as stated by the organisations’ participants from IT and business from the Al-Rajhi and Albilad banks and Toyota as the following excerpts show when their participants said:
“Yes, we had awareness and training programmes, done by the training department. We did start the programme in the design stage by system integrator staff and this was carried on later by the training department for all the project users.”  (Org.PM.R.Q11)

“Yes, we had a training programme, and this was done by the system integrator. We started the training in the construction phase.”  (Org.PM.B.Q8)

“Yes, we had awareness-raising and training for the business for CRM.”  
(Org.PD.Toy.Q15)

In SAPTCO, participants in customer care claimed that training was done very quickly and briefly, as stated below:

“Since there was late involvement from the business, the training was done in a very short time, and many functions in the applications were not explained in a proper way.”  
(Org.CC.SAPT.Q6)

CRM Champion was essential for building up buy-in for the project and at the same time reduces end-user resistance. This was stated by organisation participants from the Al-Rajhi and Albilad banks and Toyota. The following excerpts illustrate this:

“There was a CRM champion from the business people for the second phase: ‘marketing and analytic phases’; this helped a lot to encourage the end-user to get involved early in the project, and minimised the resistance that may have been
experienced from them after the deployment. The super-user or CRM champion’s team was involved in the design stage till end of the project.”  (Org.BM.R.Q12)

“Since the business led the validation and deployment phase, you could call them the "CRM champion team" of the project.”  (Org.PM.B.Q9)

“... There was a ‘champion team’ that worked to increase the buy-in and awareness for the project within their department and the people below them.”  (Org.PM.Toy.Q5)

### 6.3.8 Data Quality

Two concepts emerged from the interviews with the organisations - data completion and data cleansing, – both of which were stated by the organisations’ customers earlier. Although some activities to improve data quality were carried out by most of the five organisations, some customers' data was missing or incorrect, as stated by participants from telecom regulator, STC, the Al-Rajhi bank, Toyota and SAPTCO as follows:

“... We had worked hard for the last five years with all of the telecom companies, by encouraging them to cleanse and complete their customer data. This was not working; then we introduced penalties for the companies who were not cleansing their customers’ data.”  (Org.Regulator.Q1)

“We thought the integration with the Home Office would be enough to complete and cleans our customers’ data, however, the result of our segmentation was very low; we
do not know what the problem was but definitely something to do with the accuracy of the data or missing data.” (Org.PD.STC.Q34)

“We relied on our core banking systems to provide us with customers’ data and this is again another issue missing in our project, because some of the customers’ data was either not updated or is missing.” (Org.BM.R.Q6)

“Because the quality of our data was low we have failed to segment our customers.” (Org.CC.Toy.Q2)

“Due to the poor quality of our customers’ data, categorising our customers based on their profile was difficult without cleansed and completed customers’ data.” (Org.BM.SAPT.Q1)

6.3.9 Data Privacy

The data revealed compatible responses from customers, organisations, the telecom regulator and SAMA about data privacy, i.e. the need for fully defined data privacy rules to protect the confidentiality of customers' data, which should improve a customer’s trust to share his/her personal data with organisations - particularly females. The same customers' concepts were identified from the organisations’ responses: data access, sharing, and confidentiality rules. All of these concepts represent data privacy to the organisations.
Data access is an issue confirmed by the telecom regulator, SAMA and the Albilad bank, as the following examples illustrate:

“Again this should be part of the data privacy rules; companies are requested to limit accessing data to certain employees. To be honest we have not audited this issue with telecom companies before.” (Org.Regulator.Q8)

“Yes, banks should limit the access to customer data to certain employees, and this applies in the banks. However, most of our employees in the banks are men so it is difficult to limit the access of female customers’ data to only female employees.” (Org.SAMA.Q1)

“Finally we do have rules inside the bank for data privacy, but to be honest it needs to be reviewed, to be very strict in order to convince customers.” (Org.BM.B.Q9)

Business participants from the five organisations confirmed that female customers did not like sharing their data, as stated by the following examples.

“Yes, customers, particularly female, did not like sharing their personal data. Nearly 45% of our customers are female and 70% of them registered under a male. This is a serious issue.” (Org.CC.STC.Q12)

“…In my opinion most of the female customers do not want to share their personal data…” (Org.CC.R.Q12)
“...However, we had some customers who opened their account under another name, but these customers were few in number.” (Org.CC.B.Q12)

“...People do not like to share info; we are still behind in CRM.” (Org.PM.Toy.Q3)

“...More than 90% of females issue tickets under their male relatives, like sons or husbands.” (Org.BM.SAPT.Q3)

Data confidentiality rules was another issue that was noticed by the telecom regulator and business participants from the Al-Rajhi bank. The following excerpts illustrate this:

“... Regarding data privacy rules, we had created rules for data privacy, but I think these rules need to be reviewed and should contains penalties for the companies who break the data privacy of customers. This will increase the trust of the customers and encourage them to share their data.” (Org.Regulator.Q1)

“As you mentioned earlier, there are different reasons for this problem. We need to work with all telecom companies to agree on certain rules that encourage the customers to register their accounts under their own names, and increase the data privacy rules to increase the trust of those customers and the sharing of their data.” (Org.Regulator.Q3)

“We have not had any campaign to encourage our customers to share correct data; to protect data privacy we have restrictive rules within the bank and we are applying penalties to any employee who breaks the rules.” (Org.CC.R.Q13)
6.3.10 Policies and Procedures

Based on the data, it appears that the organisations, SAMA and the telecom regulator agreed with the customers’ views about the lack of certain procedures and policies for providing services for all customers regardless of their gender, and managing the legality issues faced by some customers particularly females. Two concepts emerged in relation to this category: female services and legality. As shown by the next excerpt, a participant from STC mentioned that all services were available for female customers, but that some of the services, like roaming, require a sponsor.

“All the services are available for females, however, because roaming and increasing the credit limit services may raise the bill significantly, we ask the female for a sponsor to guarantee our money.” (Org.BS.STC.Q10)

A participant from the telecom regulator was aware of the issue and he promised to solve it, as shown by the excerpt below:

“We inform all the telecom companies that they need to find a better solution for the lack of some services for females; this needs to be solved immediately and we should work with them to solve the issue.” (Org.Regulator.Q4)

Similarly, to customers’ interviews, offices for females were an issue, as described by the business people of Toyota and the telecom regulator by the following excerpts:

“There are no specific offices for females, because very few female customers register the car under their own names. Although 30% of cars are sold to women, very few
customers register under their own names because women are not allowed to drive and many car services offices, like car insurance, police offices and driving licence offices, never deal with women. There are no offices for them so most of our female customers prefer to register under their husbands’, sons’, brothers’ or fathers’ names to avoid dealing with any car problems that may happen in the future. Only 2% of females register under their own names.” (Org.BM.Toy.Q7)

“The problem remains the same, because different parties are involved in the female offices problem, like lack of offices for females in insurance companies, police, car dealers and driving licences to register the car. This really a big issue since 30% of car customers are females.” (Org.BM.Toy.Q8)

“This is true and again this comes back to companies and how many females customers register under their own names. I think if we want success we need to encourage female customers to register under their own name and at the same time telecom companies should provide enough offices for females.” (Org.Regulator.Q5)

The legality issue was another issue declared by participants from the telecom regulator and SAMA, as described by the excerpts below when their participants said:

“We aware that customers' data have been sold by telecom companies for commercial companies without permission from customers and we are in the plan to setup rules for stopping this” (Org.Regulator.Q9)
“Still there are no rules to stop selling customers data” (Org.SAMA.Q8)

Another issue was the probability of mobile misuse by customers who do not register it under their name, as exemplified by the following excerpt:

“... Approximately 50% of customers registered accounts under other names and most of them were females. This causes legality problems for telecom companies - if some female customers misuse the mobile phone, who should be responsible?” (Org.Regulator.Q2)

“...Nearly 20% of customers register their bank accounts in others’ names, and high percentages of them are females. The bank deals with a registered account, i.e. the one who opens the account under his name will be responsible for his account.” (Org.SAMA.Q3)

6.3.11 Organisational Culture

Three further concepts were identified for the organisational culture: organisational change, CRM strategy and developing a customer-centric strategy. These concepts represent concerns within the culture of the organisations.

Managing change, people and culture to fit the solution helped to minimise customisation and experience the maximum benefits of CRM, as explained by the project director of Toyota by the following excerpt:
“We started with a feasibility study of our business units in the organisation and we had identified the buy-in from some business units for their interest to transform their business process to be adapted with Siebel CRM. ... HCL won the consultancy part, which included Organisation Change Management (OCM); helping change the organisation’s culture including training; awareness; managing the change; communication; achieving buy-in from business; and realising the benefits to the people and process. This was very useful for project management.” (Org.PD.Toy.Q2)

Another participant from the same organisation claimed that there was a problem with employee culture in accepting new ways of serving customers, as described by the following example when he said:

“Some people revert to the old way .... The major issue is employee culture, since CRM, like salesmen, might not be keen to enter customer data.” (Org.PM.Toy.Q3)

In contrast, there were no organisational change programmes aligned with the CRM implementation in the Al-Rajhi bank and SAPTCO, as shown by examples below when their participants said:

“Leading banks in the world take CRM as a whole solution, which includes changing their process, people, organisational culture and environment to be customer-focused. In contrast, our CRM implementation was missing all of these parts, which makes it difficult for the CRM systems in our bank. In summary, there was no change management or culture programme aligned with the CRM project.” (Org.CC.R.Q8)
“We believe that we are not ready for CRM in our organisation as long as there is poor quality customers’ data, a lack of an agreed business process and the absence of a culture change program, but IT was pushing for CRM implementation and we had been forced by senior management to start the CRM implementation. This led to resistance from our side at the earlier stage.” (Org.CC.SAPT.Q3)

The CRM strategy was one of the important factors that should be developed at an earlier stage of CRM implementation, as explained by the project director of Toyota in the excerpt below:

“… In addition, we had issued the RFP but before that we had worked with a consultant to develop the CRM strategy, and based on that we had developed the RFP with help from Oracle …” (Org.PD.Toy.Q2)

In contrast, there was no CRM strategy at the Al-Rajhi and Albilad banks or STC, as illustrated by the excerpts below:

“Unfortunately, there was no CRM strategy; this was a big mistake because it increases the number of risks in CRM implementation.” (Org.PM.R.Q9)

“Frankly speaking, we had no strategy for CRM, however, we had a strategy for a customer-centric environment and this strategy was the basis for the customer care business process...” (Org.CC.B.Q4)
“At the beginning there was no CRM strategy so we aligned with the corporate strategy.” (Org.PD.STC.Q25)

Developing a customer-centric strategy was the basis for introducing a CRM solution, as revealed by participants from the Al-Rajhi and Albilad banks and Toyota when they said:

“... Finally, the vision of CRM was aligned with the company strategy, which was customer-centric.” (Org.CC.R.Q7)

“In fact, there was no CRM strategy; however, there was a corporate strategy, which is to be more customer-centric” (Org.PD.R.Q18)

“Frankly speaking, we had no strategy for CRM, however, we had a strategy to be customer-centric and this strategy was the basis for the customer care business process...” (Org.CC.B.Q4)

“No, we had to rely on the best practice and external consultants to build a customer-centric strategy.” (Org.CC.B.Q5)

“Yes, the CRM strategy was aligned with the customer-centric strategy.”

(Org.PD.Toy.Q9)
6.4 Relationships between Categories and the Core Category

All the categories that emerged from the customer and organisational perspectives were examined and refined as part of scaling up (cf. Section 4.7.1.1), which resulted in the identification of ‘culture’ as the core category and central phenomena. This category was linked to other categories at a high level, as presented in Figure 6.2. Symbols (R1…R10) were thus given for each relationship. In order for the figure to be well presented, concepts have been extracted from Figure 6.2 and presented in Table 6.2.
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Table 6-2: Categories and Concepts From Customers' and Organisational Perspectives
R1: Culture can impact on the success of CRM implementation by affecting data completion and cleansing i.e. social aspects, misunderstanding of the Islamic religion and the fear of accessing the data of female customers by male employees thus preventing them from sharing their data (cf. Sections 6.2.7 and 6.3.9). The influencers for this impact are customers, organisations and regulators.
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R2: Culture can affect company regulations by affecting the completion of certain rules associated with female customer related services. Females are thus absent from roles, such, as the police and insurance companies. Female accounts are hence registered incorrectly under a male member of the family (cf. Sections 6.2.4 and 6.3.10). The influencers for this impact are customers, organisations and regulators.

R3: Culture can affect the success of CRM implementation by affecting CRM awareness of employees within an organisation, i.e. organisational culture can have an impact on end user involvement, awareness, and training (cf. Section 6.3.11). Organisations are the influencer for this impact.

R4: Culture can affect the success of CRM implementation by affecting the manner by which the business is driven. For instance, the quality of CRM and customer-centric strategies either can positively or negatively affect the vision of projects, setting the priorities of business, building a clear business case and the completion of business needs and requirements (cf. Section 6.3.1). Organisations are thus influencers for this impact.

R5: Culture can affect the category of project management via organisational cultural change affecting the percentage of CRM product customisation, for instance changing people, the process and culture to fit the CRM product and thus reduce the volume of customisation for the CRM product (cf. Sections 6.3.1 and 6.3.2). Organisations are the influencers for this area.
R6: Culture can also influence the measurement of CRM success via CRM strategy. For instance, organisations that possessed a clear CRM strategy were able to gain a clear measurement for implementing CRM (cf. Sections 6.3.1). Organisations are the influencers for this impact.

R7: Culture can play an overall role, which impinge on customer needs, i.e. where customers refuse to give their data to organisations, which ultimately affects their identification and resolution (cf. Sections 6.3.6). The influencers for this impact are the organisations and the customers.

R8: Culture can drive top management commitments via the development of CRM and customer-centric strategies to obtain the required commitment. For example, having a CRM strategy in the earlier stages has helped organisations to receive the required budget support and resources from the top levels of management. Organisations are thus the influencers for this. This is illustrated when an organisation participant said:

"...Moving from product-centric to customer-centric was one of the CRM drivers, which help to get the senior management commitments and supports" (Org.PD.STC.Q33)

R9: Culture can have a significant impact on technology by having a clear CRM and customer-centric strategy. This can help organisations to select the most suitable CRM product that can meet the majority of their requirements. Organisations thus take responsibility for this. This is illustrated when an organisation’s participant said:
"Selecting Siebel product was a strategic decision to help organisation to be customer focus" (Org.PD.B.Q25)

R10: Culture can constitute and have a significant negative impact on data privacy. For example, about social aspects, misinterpretation of religion and fear associated with the accessing of data by male employees so preventing female customers from sharing their data with organisations (cf. Sections 6.2.7). Those responsible for this impact are customers, organisations and regulators.

6.5 Interrelationships between Critical Success Factors

As previously mentioned in Section 3.2, and by Sanad et al. (2010, p. 1), CSFs are,

“Interlinked, they represent factors at nodes in a network of influences, which need to be examined together in order to determine best practice, identify research issues and reflect on strategy.”

All of the concepts, which emerged from the customer and organisational perspective were examined, refined and resulted in the identification of thirty-two CSFs (See Tables 6.3 or 7.1). These factors were interlinked in thirty-one cause-effect relationships in order to explain the CSFs interrelationships for CRM implementation within the private sector of the KSA as presented in Figure 6.3. Symbols (R1…R31) were given for each relationship.
Figure 6-3: Interrelationships Between Factors from Customer and Organisation Perspectives
R1: The CRM strategy is reliant on the plan for the whole organisation to change from being product-centric to customer-centric. For instance, CRM and organisational strategies need to be aligned as described by the following excerpt:

“Yes, the CRM strategy was aligned with the customer-centric strategy.”
(Org.PD.Toy.Q9)

R2: Top management commitment would be dependent on CRM strategy in order to take the decision about how the CRM would be implemented within the organisation. For example, organisation participant said:

“The supports and commitments from the top management during the project implementation were low due to lack of clear strategy for how CRM will be implemented.” (Org.PM.R.Q19)

R3: The setting of the CRM success measurement would be based on CRM strategy. This is illustrated by an organisation participant when he said:

“We found quite difficult to set a clear measurement due to lack of a strategy for CRM adoption.” (Org.PD.B.Q19)

R4: CRM strategy would be reliant on the CRM vision. As illustrated by an organisation participant when he said:
“Yes, the project vision was developed before starting the CRM project, and was based on the business vision.” (Org.PD.B.Q16)

R5: The business case requires alignment with the CRM vision. For example, organisation participant said:

“Since we are not leading the project, aligning the project vision with the business vision did not happen due to there being less business influence at the beginning of the project.” (Org.BS.STC.Q11)

In the Albilad and Al-Rajhi banks, however, a clear project vision was developed before starting the CRM project.

“The project vision is to implement CRM systems to help businesses in their vision, which is to move from a product–centric to a customer–centric perspective and this was clear from the top management and the business people.” (Org.PM.R.Q8)

R6: The building of a business case would facilitate top levels of management to be committed to the allocation of the required budget, support and resources. For example, organisation participants said:

“Allocating the needed budget was not so difficult due to a clear business case, and that was supported by the business, which was used to measure our success in the CRM project.” (Org.PD.Toy.Q8)
“... The STC board of directors requests a clear business case in order to approve the budget and because the business was not in the picture at that time, IT had a difficult time allocating the required budget.” (Org.BS.STC.Q3)

R7: The selection of the systems integrator would depend on how much budget, support and resources were available or given from the top levels of management for selection. For instance, any limitation of the budget, support and resources from management would affect the selection of the system integrator. This is illustrated by an organisation participant when he said:

"In the end the board of directors approved the budget with a deduction of 50% with a recommendation to invite Indian integrator companies. This was a bad recommendation as it excluded the leading integrators like Accenture, Bearing Point and Cap Gemini due to the limited budget.” (Org.PD.STC.Q5)

R8: Top levels of management need the business to lead the project. As three organisation participants said:

“...Because we are as a business not fully in the picture. IT people never communicate the issues in the early stages so we can help to convince the CEO to change the plan. As a business, we are the revenue generators in our company and our voice is always acceptable to upper management, particularly the CEO.” (Org.BS.STC.Q8)
“Frankly speaking, IT was working alone in preparing the RFP and once it was completed they asked us to review it in two weeks. In addition, we are the sponsor of the project but in reality, we are not. Most of the important decisions in the project have been taken without our direction. As a result there was less trust between us and the IT PM during the whole project period. ... “ (Org.CC.R.Q7)

“The project plan was not approved by the business, and they are the customer and the people who will operate the systems and benefit from it. As a result, the business strongly resisted accepting the system.” (Org.PD.SAPT.Q14)

R9: Sponsorship of the project by the business would help to build a clear business case. As two organisation participants said:

“Allocating the needed budget was not so difficult due to a clear business case, and that was supported by the business, which was used to measure our success in the CRM project.” (Org.PD.Toy.Q8)

“... The STC board of directors requests a clear business case in order to approve the budget and because the business was not in the picture at that time, IT had a difficult time allocating the required budget.” (Org.BS.STC.Q3)

R10: Sponsorship of the project by the business would assist organisational cultural change. An organisation participant said:
“We started with a feasibility study of our business units in the organisation and we had identified the buy-in from some business units for their interest to transform their business process to be adapted with Siebel CRM. ... This was very useful for project management.” (Org.PD.Toy.Q2)

R11: Sponsorship of the project by business would facilitate collaboration from business employees. A participant said:

“I am not sure but business thought they had power in the company and should not be led by IT people; this thought caused lots of bad communications between the project management team and business people...” (Org.PD.R.Q12)

R12: A qualified project management team would lead to good communication and collaboration between the project’s stakeholders. Two organisation participants illustrate this when they said:

“...There were many reasons for the delay, such as the inexperience of the project management office staff leading to poor project plan expectations, less commitment from other systems to the integration date proposed in the project plan, and underestimation of the complexity of the project from the integrator.” (Org.BS.STC.Q7)

“No, the project has been delayed for more than six months because of bad project plan estimations from the project management office.” (Org.CC.Toy.Q3)
R13: The finalised business needs and requirements would be more accurate if the business sponsored the project. This is illustrated by the following excerpt.

“Since the business led the project, we had the participation of two dedicated excellent business analysts from business sector with help from an external consultants to finalise the business requirements and build the business process of customer care from scratch.” (Org.CC.B.Q3)

R14: Accepting the involvement of the end user in the early stages of the project would be much easier if the business sponsored the project. For example, organisation participant said:

“...Having the sponsor from the business helps to encourage and get the commitment from the business for the project...“ (Org.PD.Toy.Q5)

R15: Reducing the percentage of product customisation would depend on changing the organisation’s culture, i.e. changing the business process to fit the CRM product and thus reduce the percentage of customisation. This was illustrated by the following excerpt.

“Since we were a green field, it was decided to implement out-of-the-box functionality (95%) from the Seibel CRM product, with minimum customisation. We relied on the business process that had been built during the early stages of the project.”

(Org.CC.B.Q10)
R16: Selecting the CRM product would have an effect on the suitable integrator capable of implementing the CRM product. This is illustrated by the following excerpt.

“Selecting Seibel as CRM product was limit the system integrators selection”
(Org.PD.STC.Q23)

The vendor’s expert role was crucial for developing the Request for Proposal (RFP), evaluating the integrator’s responses for the RFP, reviewing the project plan and auditing the system integrator’s work as stated by different participants from Toyota, the Al-Rajhi bank and SAPTCO in the following excerpts when they said:

“Yes, Oracle was involved and they reviewed the project plan but there were internal delays because of a new business requirement.” (Org.PD.Toy.Q12)

“Yes, Oracle expertise was involved as an audit for the system integrator’s work.”
(Org.PD.Toy.Q14)

R17: The involvement of an external consultants would affect the selection of the right systems integrator. This is illustrated by the following excerpt.

“Yes, there was a big evaluation team representing all the stakeholders (all the departments who were going to benefit from the systems) and the GIZA Systems Company was involved as an external consultants who was going to help STC in the system integrator evaluation.” (Org.PD.STC.Q7)
R18: The involvement of product vendor experts would have an effect on assuring system integrator capability. As illustrated by the following excerpt.

“There was an evaluation team composed of the business department (sales, customer care and marketing), IT people, a project management team, the procurement department from inside the bank and two Oracle experts as external consultants from outside the bank.” (Org.PD.R.Q6)

R19: The estimation of the project plan would be reliant on the skills and experience of the project management team. This is illustrated when an organisation participant said:

“As explained in the previous question, the project management office received the project plan from the integrator and has not expressed their comments on the plan due to inexperience of their staff for such a project.” (Org.PM.STC.Q3)

“The project has not finished on time because of the following: three different projects were running in parallel, the project management office team have not got enough experience to make early judgements on the project plan and there were about 36 integrations without priorities; involving business people, which is the project management office’s responsibility.” (Org.PM.STC.Q4)

R20: Having the business sponsor the project would help to achieve better CRM awareness for customers. This is illustrated by the following excerpt.
“Due to little involvement from the business, customer awareness was not considered as important activity” (Org.PD.SAPT.Q21)

R21: Having a CRM champion would be based on the early involvement of the end users. The following excerpts illustrate this.

“There was a CRM champion from the business people for the second phase: 'marketing and analytic phases'; this helped a lot to encourage the end-user to get involved early in the project, and minimised the resistance that may have been experienced from them after the deployment. The super-user or CRM champion's team was involved in the design stage till end of the project.” (Org.BM.R.Q12)

“Since the business led the validation and deployment phase, you could call them the "CRM champion team" of the project.” (Org.PM.B.Q9)

“... There was a ‘champion team’ that worked to increase the buy-in and awareness for the project within their department and the people below them.” (Org.PM.Toy.Q5)

R22: Setting the priority for the business would be reliant on finalising business needs and requirements. Two organisation participants said:

“At the beginning, the CRM team found out that there were no clear objectives and priorities from the Mobile sector. Therefore, the CRM team set up lots of meetings with business people to clarify the objectives and priorities. As a result, the CRM team has agreed that in order to minimise the risk for the implementation, projects need to be
“Yes, we did set up the measurable goals and metrics and these are connected to key business indicators. We had asked the project manager to align them with project objectives but they said it was too late For instance, we had prioritised the marketing module as the first phase ....” (Org.CC.R.Q2)

R23: Customer needs would ultimately have an effect on business needs and requirements. This is illustrated as follows.

“Of course, customer inputs are very important in determining requirements so the lack of customer participation was negative.” (Org.BS.STC.Q1.2)

R24: Early end user involvement in the project would facilitate the awareness and training for the end users as one organisation participant said:

“Since there was late involvement from the business, the training was done in a very short time, and many functions in the applications were not explained in a proper way.” (Org.CC.SAPT.Q6)

R25: The external consultants exerts an effect on CRM product selection. This was shown when a participant said:
“The evaluation has been done by involving a team from inside and outside the organisation and using worldwide evaluation reports produced by Gartner and Forrester consultancy companies to select the leading solution in the market, which was the Siebel product.” (Org.PD.Toy.Q2.1)

R26: The phased approach for CRM implementation would have a positive effect on the project plan by reducing the dependencies of the project’s activities. One organisation participant said:

“... Due to the time limitations, it has been decided to split the project into three phases. Basic functions for the first phase were sale, customer care and marketing without integration, the second phase was to integrate with other systems and the last phase was to complete the remaining functionalities and analysis.” (Org.PD.B.Q4)

R27: The integration between the CRM application and other required applications would have an effect on the finalisation of the project plan. The following excerpt illustrated this.

“Obtaining an agreed project plan for the integration with other existing systems inside the bank was a big challenge, because every system has its own project plan and priorities and to agree on one project plan for the integration was impossible.” (Org.PM.B.Q5)
Chapter Six

Data Analysis

R28: Policies and procedures have an effect on the quality of data. The following excerpt illustrated this when a female customer participant said:

“No, it is under my husband’s name, because it will be difficult to get the service if I register the car under my name. Car insurance, police offices and car dealers have no female officers to handle my service requests. Finally, this will avoid any accessing of my personal data including my photo.” (Cu.Toy4.F.Q2)

R29: Data privacy has an impact on the quality of data as illustrated by the following excerpt.

“My husband shared the data with SAPTCO; it was needed to purchase ticket, I am not fully confident about sharing my data.” (Cu. SAPT4.F.Q4)

R30: Having the business sponsor the project would ultimately help to improve the quality of the data. Two different company participants said:

“Data quality was an issue since the IT was driving the project of the data cleansing.” (Org.PD.STC.Q36)

“We relied on our core banking systems to provide us with customers’ data and this is again was another issue missing in our project, because some of the customers’ data was either not updated or is missing.” (Org.BM.R.Q6)
R31: Customer cultural factors, such as religion, social norms and the accessing of female data by men, could affect the quality of data. This was illustrated when a female participant said:

“It was under my husband’s name, I normally order any tickets from SAPTCO through my husband. It is much easier than to issue it under my name. Moreover I do not accept anybody can have access to my data; it is forbidden in Islam and is against our culture.” (Cu.SAPT4.F.Q2)

### 6.6 The Relationships between CRM’s CSFs and the Key Development Stages

As aforementioned in Section 3.2, and by Sanad et al. (2010, p. 1) CSFs are,

“Hierarchical and can be identified at various levels in an organisation or a project.”

In order to address the third sub-research question, which is aims to identify the relationship between the CRM’s CSF and the key development stages, the researcher applied an ‘ending question’ (cf. Section 4.7.1.2) to demonstrate the lessons learned by the five organisations after applying CRM.

Table 6.3 presents all the CSFs of CRM with the right key development stages. The researcher asked direct questions to participants of the organisations, such as ‘When do you think is the right stage to generate the project plan?’ or ‘What if things went along fine; when do you think the right stage would be for setting business priorities?’
Such questions were used with different participants in different organisations. The majority of the answers were consistent. There, however, were a few differing opinions that led the researcher to ask more people for clarification. Amongst 32 CSFs, three (from 30 to 32 inclusive) needed to be amended and finalised before the development stages. This where the researcher suggest a new stage called assessment stage because data privacy, customer’s culture and policies and procedures need to be considered before commencing CRM implementation (this and the allocation of CSFs to stages will be discussed further in Section 7.3).
<table>
<thead>
<tr>
<th>Seq</th>
<th>CSFs</th>
<th>Assessment</th>
<th>Planning</th>
<th>Defining</th>
<th>Discovery</th>
<th>Design</th>
<th>Construction</th>
<th>Validation</th>
<th>Deployment</th>
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<td>14.</td>
<td>Project Plan</td>
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<td>15.</td>
<td>Minimise customisation</td>
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<td>18.</td>
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<td>22.</td>
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<td>24.</td>
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<td>27.</td>
<td>Vendor Experts</td>
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<td>Data Privacy</td>
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<td>31.</td>
<td>Customer Culture</td>
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<td>32.</td>
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<td>✓</td>
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</tr>
</tbody>
</table>

Table 6-3: CSFs of CRM and Key Development Stages
6.7 Conclusion

This chapter has presented the outcomes of the data analysis from both the customer and organisational perspective within five organisations that operate within the private sector of the KSA and their customers, using a Grounded Theory protocol. All the categories and their concepts have been identified via the application of continuous interaction of data gathering and data analysis as shown in Table 6.2. The relationship between the core and other categories (cf. Section 6.4) is shown in Figure 6.2. Section 6.5 shows the interrelationship between concepts (CRM’s CSF). Section 6.6 shows their relationship with the CRM development stages. The next chapter will provide a critical discussion of the findings.
Chapter Seven: Discussion

This chapter presents a discussion of the research findings and outcomes of the fieldwork presented in Chapter Six, by comparing them with those reported in the literature (cf. Chapters Two and Three), with the emphasis of answering the research questions. The chapter offers a deep understanding of the research’s findings by applying Institutional Theory (Scott, 2008). This approach will provide a greater theoretical explanation for the findings and result in developing an integrated model to support effective CRM implementation within the private sector of the KSA.

7.1 Critical Success Factors for CRM Implementation

The second sub-question (cf. Section 1.3) is to identify the CSFs of CRM within the private sector of the KSA, with the ultimate aim of comparing them with the literature review for CSFs of CRM within the developed country. This research found thirty-two CSFs for CRM in the KSA compared to thirty in the literature, as summarised in Table 7.1. Two new CSFs for CRM implementation, therefore, were identified by this research. The first factor pertains to customer culture (cf. Section 6.2.7), such as norms, values, beliefs and social customs, which prevents customers, particularly females, from giving their data to organisations. The second factor is related to country policies and procedures (cf. Sections 6.2.4 and 6.3.10), for instance, the lack of service offices for females has discouraged customers from registering their accounts under their names.

It is important to mention two issues here:

- As shown in Table 3.2, there are some extra factors existing in the literature, but have not been identified within this research such as knowledge management capabilities, holistic approach, managing vendor relationships, benchmarks,
resistance to change, and troubleshooting and technical support. These factors are either so obvious so as not to merit explicit identification or were simply not an issue within the five organisations and their customers within the private sector of the KSA. As the research is inductive (cf. Sections 4.3.1 and 4.4), where the data should emerge from the interviewees without imposing from the literature, the researcher did not ask the participants about these factors, and thereby is unable to comment any more as to their significance.

- Interestingly, on closer inspection of Table 7.1, it appears that although there are some differences in CRM’s CSFs identified for the KSA to those found for developed countries, a high percentage of them are similar. This brings into question just how different the KSA situation is to those of developed countries. Taking the UK as an example developed country, for instance, many cultures at a community level exist within a different overarching national culture. Some of these community cultures may resemble that found predominantly within KSA. This may be a reason for the large proportion of similarities in CRM CSFs that have been found with this research. However, further research would need to take place to examine this interesting aspect further.

The factors (in Table 7.1) within the existing research have been organised and grouped into twelve categories as a result of applying the Grounded Theory for data analysis method (cf. Sections 6.1, 6.2 and 6.3). These factors, and their presence within the existing literature and the current research, are shown in Table 7.1, and explained in the following twelve sections.
<table>
<thead>
<tr>
<th>Seq.</th>
<th>Categories</th>
<th>Critical Success Factors</th>
<th>Developed Country</th>
<th>KSA</th>
<th>Previous Studies</th>
<th>Current Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Project Management</td>
<td>Team qualifications and skills</td>
<td>✔ ✔</td>
<td>Kim et al. (2002), Ocker and Mudambi (2003), Silva and Rahimi (2003), and Ranjan and Bhatnagar (2008)</td>
<td>Two case studies (STC and Albilad)</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Collaboration</td>
<td>✔ ✔ Ocker and Mudambi (2003), and Blery and Michalakopoulos (2006)</td>
<td></td>
<td></td>
<td>Three case studies (Al-Rajhi, Albilad and STC)</td>
<td></td>
</tr>
<tr>
<td>5.</td>
<td>Minimise Customisation</td>
<td>✔ ✔ Alt and Puschmann (2004), and Oracle, (2006b)</td>
<td></td>
<td></td>
<td>Three case studies (Albilad, STC and Toyota)</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>Data Quality</td>
<td>Data Quality ✔ ✔ Alt and Puschmann (2004), Al-Ajlan and Zairi (2005), Forrester (2005), Blery and Michalakopoulos (2006), and Mendoza et al. (2007)</td>
<td></td>
<td></td>
<td>Participants from all the five organisations, customers and telecom regulator</td>
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<tr>
<td>8.</td>
<td>CRM Awareness</td>
<td>End user involvement ✔ ✔ Kim et al. (2002), Forrester (2005), Gartner (2006), and Oracle (2006b)</td>
<td></td>
<td></td>
<td>All the five case studies</td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td>End User Training and Awareness</td>
<td>✔ ✔ Ocker and Mudambi, (2003), and Oracle (2006b)</td>
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<td>All the five case studies</td>
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<td>10.</td>
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<td>Developed Country</td>
<td>KSA</td>
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<td>Two case studies (Al-Rajhi, Albilad and Toyota)</td>
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Table 7-1: The Comparison of CSFs for CRM Implementation Between the KSA and the Developed Countries
7.1.1 Project Management Factors

Six critical factors (cf. Section 6.3.2 and Table 7.1) were identified that are associated with project management; team qualifications and skills, collaboration, integration, project planning, minimisation of customisation, and a phased approach.

Good skills and qualifications of the project management team can influence the ability to achieve an agreed and approved project plan, to manage the system integrator, to deal with business involvement and support, and to obtain the commitment of IT people for the integration of other systems. Many issues, such as delays in the project and integration failure between systems were caused by individuals with inadequate skills and poor qualifications.

Project integration needs the full collaboration and commitment of all the stakeholders. In order to meet the project’s plan, it may need to be implemented in phases to overcome the risks of having different integrations occurring at the same time.

A phased approach is important to reduce risk, to provide more time for the business, to reduce the number of people that need to be trained on the system, to manage the shortage of resources and to enable buy-in from the business by showing some functions of the production in a short period.
It is important to avoid customisation of the CRM application by changing the business processes of organisations in order to fit best practice. This approach should help organisations to benefit from the main goals of CRM.

7.1.2 Data Quality Factors

Reaching completed and cleansed data (cf. Section 6.3.8 and Table 7.1) is necessary in order to achieve the main objectives of CRM implementation. Absent data will negatively affect understanding customer’s attitudes and behaviour. Removing data duplication by unifying customer profiles and improving accuracy will positively influence CRM project implementation. Thus, with improvements in the quality data that is collected from customers, the greater the customer understanding that can be achieved.

7.1.3 CRM Awareness Factors

Four critical factors were identified that relate to CRM awareness (cf. Section 6.3.7 and Table 7.1); end-user involvement, its training and awareness, customer awareness, and CRM champion.

Having the end user involved during the early stages of the CRM project is useful in order to obtain the needed support to finalise business requirements and obtain user acceptance at the end of the project. Moreover, early end-user involvement could increase the buy-in for the CRM project across the entire organisation.
Preparing an awareness program to show the advantages and the disadvantages of CRM for customers was deemed beneficial prior to the system going live. This should improve customer acceptance and set clear expectations regarding the system. In addition, training and awareness should also cover all departments that are potential users of the system and help them to change their ways of facilitating business in a more customer-oriented manner.

Having a CRM champion is important for a CRM project. It develops buy-in for the project and minimises the resistance of the end-user. The CRM champion is used by the organisation as an additional tool to spread the CRM concept throughout the organisation.

### 7.1.4 Business-Driven Factors

Five critical factors were identified in terms of business-driven; (cf. Section 6.3.1 and Table 7.1); CRM vision, building a business case, business sponsorship, setting business priorities and business needs. A clear vision for a CRM project aligned with a business vision is crucial for successful CRM implementation. It is important to finalise the vision in the early stages and before the commencement of the project. A lack of clarity regarding the direction of CRM will result in less involvement from company staff and more resistance for system acceptance. In addition, communicating the vision to each department will increase the buy-in for the project and reduce resistance.
Building a strong business case helps to demonstrate the benefits of CRM implementation and present a justification from the top levels of management for providing the required budget, resources and support.

Business sponsorship is important in facilitating some tasks and activities, such as aligning business and project visions, finalising business requirements, getting early buy-in from business employees and achieving system acceptance.

Setting business priorities is a business task designed with the purpose of phasing the implementation and reducing the risk. This aims to encourage business buy-in by addressing the neediest areas first. Project managers could also increase the acceptance for projects by implementing the greatest priority requirements to achieve a quick result.

Business needs require full commitment from the business to finalise the requirements accurately and completely. Having the business lead the formative phases of the project was useful in order to obtain commitment for the needs and requirements finalisation.

### 7.1.5 Technology Factors

Four critical factors were identified that related to technology (cf. Section 6.3.3 and Table 7.1); software selection, vendor experts, external consultants and a systems integrator selection. The responsibility for these factors rests with the project management team, with some involvement from IT and business when necessary. The
organisations’ participants revealed similar procedures when selecting the right software able to meet their business needs and to select the right integrator with the capabilities for implementing the software.

Selecting the right software that meets the majority of the business’s requirements helps to prevent significant software customisation, increase end user acceptance and reduce the negative impact on the business operation.

Vendor experts are a very crucial factor in the success of CRM implementation as they play a major role in auditing the system integrator’s work, help to configure the software to meet the business’s needs, confirming the estimation of the project plan and overcoming any obstacles in the software, which may be encountered during the project implementation.

External consultants also play a major role in system integrator selection by reviewing the requirements, developing the business processes and building a customer-centric strategy.

Checking the capability and accountability of the system integrator via consultant’s reports and by obtaining other company’s experiences is vital for awarding the contract to the right system integrator. Sufficient experience and available resources were considered important criteria in order to judge the capability of the system integrator.
7.1.6 Top Management Commitment Factors

Three critical factors were identified that related to top management commitment (cf. Section 6.3.4 and Table 7.1): allocating the required budget, receiving the needed support over the period of the project, and assigning the right resources from both inside and outside the organisation.

The majority of the organisations faced big challenges in allocating sufficient budget due to the lack of a solid business case support from the business, and to the high cost of the product and infrastructure.

A mix of expertise resources are needed from inside and outside the organisation including the integrator vendor, external consultants and a project management team. The availability and the quality of those resources are crucial to achieve maximum benefit from CRM implementation and overcome the potential obstacles during the entire project.

Receiving the required support is vital to overcome any obstacles that are encountered during CRM project implementation including replacing resources, hiring consultants or even changing the system integrator.

7.1.7 CRM Success Measurement Factor

CRM success measurement (cf. Section 6.3.5 and Table 7.1) is deemed necessary for successful CRM implementation. This factor pertains to customer base expansion, customer turnover, customer satisfaction, meeting business requirements, and finishing the project on time and within the budget. The responsibility for CRM
success measurement lies with the project management team together with a major involvement and audit by business personnel to ensure that these objectives are met.

An increase in customers, customer turnover and customer satisfaction are measurements, which were monitored throughout the whole period of the project.

Finishing the project on time and on budget, and meeting business needs were another two measurements for successful CRM implementation. Any delay to the project would result in an increase in the budget.

7.1.8 Customer Needs Factors
Two critical factors (cf. Section 6.3.6 and Table 7.1) were identified that related to customer needs; customer segmentation and involvement. Participants' responses from organisations and their customers confirmed a lack of customer involvement and segmentation within CRM implementation.

Receiving input and feedback from customers helped to enlarge the benefits of and increased the acceptance of a CRM application.

Segmentation of customers into different categories was deemed important in the early stages of CRM implementation, as organisations are more easily able to understand their customers’ profiles and their needs.
7.1.9 Data Privacy Factor

The findings of the research exposed the fact that data privacy (cf. Section 6.3.9 and Table 7.1) was an important factor for CRM project implementation. Protecting customer data confidentiality through the adoption of clear data access rules has a positive effect on customer trust and encourages them to share their personal data with organisations particularly for female customers. Organisations need to encourage customers to give their data by implementing strict rules for accessing their data. By applying these rules as a written agreement with their customers, the sharing of data with organisations should be improved.

Since this research occurred in a developing country, where culture has a major influence, data privacy is a major issue which affects the sharing of personal data with organisations.

7.1.10 Policies and Procedures Factor

The findings of the research exposed the fact that policies and procedures (cf. Sections 6.2.4, 6.3.10 and Table 7.1) issues surrounding existing factors are vital for a CRM project. Resolving the lack of services for females, by either government or specific organisations, is deemed important, as well as addressing the legality issues associated with selling customers' data for commercial purposes without their permission. This resolution should have a positive effect on the future of customer data provision.
The telecom regulator, SAMA, all five organisations and their customers agreed upon the importance of providing inclusive services for females, such as by the police and insurance companies. This is a new CRM’s CSF that has been identified as a result of this research. In addition, as previously mentioned in Section 5.2.2, this research was held within the KSA where many issues are culturally based and this, therefore, needs to be taken into consideration.

7.1.11 Cultural Factor of Customer

The finding of the research revealed that cultural factors associated with customers (cf. Section 6.2.7 and Table 7.1) are crucial for the provision of quality data to organisations, and hence for the success of CRM implementations. This factor is particularly acute in developing countries, where culture plays a major role (cf. Section 2.8). Societal norms, religion and the accessing of female data by males are issues related to culture, which need to be carefully addressed. This factor, which relates to customer culture, has not been highlighted by previous studies as being critical in CRM implementation.

7.1.12 Organisational Culture Factors

Three critical factors were identified that relate to organisational culture (cf. Section 6.3.12 and Table 7.1); identifying organisational change, CRM strategy and the development of a customer-centric strategy.

Organisational change is essential to help organisations to transform from being product-centric to customer-centric. These changes relate to each department within
the organisation and to people, processes, roles, and responsibilities so that the new objectives that are intended to facilitate business by using the CRM process can be achieved. By applying this method, organisations can expand the benefits of CRM implementation and improve their efficiency when serving customers.

A customer-centric strategy addresses all the required initiatives to move the organisation toward becoming customer-focused. In addition, a CRM strategy should be based on a customer-centric strategy and include all the required initiatives for CRM implementation in priority order.

7.2 Interrelationships between Critical Success Factors

Part of the second sub-question has been to identify the interrelationship between the CSFs for CRM implementation within the private sector of the KSA. CSFs are interdependent and influence each other. The resultant cause-effect network needs to be holistically examined (cf. Section 6.5) to identify how interlinks between CSFs actually affect the success of CRM implementation. Thirty-one cause-effect relationships between CSFs were extracted as presented in Figure 6.3 and reproduced here as Figure 7.1 for ease of reference. These relationships are deemed important and they need to occur in a dependency mode. For instance if Y and X are considered as two factors and depend on each other, Y can be achieved successfully only if X exists and supports Y. For example, successful budget allocation is based on building a quality business case (organisations that had no clear business case for approving the benefits of implementing CRM faced difficulty in defending the allocation of
sufficient budgets, required resources and needed support, which will affect the success of CRM implementation).

It is important to note that the 31 cause-effect relationships were the only ones identified by the researcher from the fieldwork. On inspection of Figure 7.1, one may question purely on commonsense grounds or based on existing literature (e.g., reference Kim et al. (2002)) whether other cause-effect relationships between CRM’s CSFs could be present, but these were not identified explicitly within the fieldwork. Like the CSFs, as discussed in Section 7.1, because of its inductive nature (cf. Sections 4.3.1 and 4.4), the research did not ask questions that related to specific relationships to determine whether or not they were present. Using a deductive approach to confirm the identification or otherwise of these additional relationships between the CSFs of CRM implementation could form an aspect of further research and investigation (cf. Section 8.3).

To simplify presentation and understanding, the thirty-one interrelationships were grouped under twelve relationships based on how these factors interlinked to each other in a way that affected the success of CRM implementation. This is explained in the following manner.
Figure 7-1: Interrelationships Between Factors from Customer and Organisation Perspectives (Copy of Figure 6.3)
7.2.1 CRM Strategy Relationships

Four relationships were involved with CRM strategy (See Figure 7.2); R1: the relationship with the customer-centric strategy factor, R2: the relationship with top management commitment factors, R3: the relationships with CRM measurement factor, and R4: the relationship with the CRM vision factor. These relationships revealed how CRM strategy was important for the success of above the CSFs and any failure to achieve the CRM strategy factor would have a negative impact on the success of CRM implementation. The relationships between these factors are explained below.

![Figure 7-2: CRM Strategy Relationships](image)

R1: Before starting the CRM project, the organisation needs to develop a CRM strategy based on a customer-centric strategy of the entire organisation. The CRM strategy should be aligned with the customer-centric strategy to develop clear initiatives for moving the organisation's processes from product-centric to customer-centric as exemplified by the case of Toyota when they aligned their CRM strategy with that of a customer-centric strategy (cf. Section 6.5). It is, therefore, important to align both strategies to achieve the CRM's project vision.
R2: In order to secure the required support, resources and budget the CRM strategy needs to provide a clear picture of the whole CRM adoption process to top management.

R3: The CRM measurement factor would be based on CRM strategy and how this strategy defined the measurement for the success of the CRM project.

R4: The CRM strategy would ultimately be finalised based upon the CRM vision. This is achieved by setting up a clear and attainable vision, and aligning CRM strategy with it in order to influence the success of the CRM project (cf. Section 6.5).

### 7.2.2 CRM Vision Relationships

The findings of the research revealed that CRM vision relationships (See Figure 7.3) were necessary for a successful CRM implementation. These relationships were composed of R4: the relationship with the CRM strategy (cf. Section 7.2.1), and R5: the relationship with building the business case. Given that R4 was explained in Section 7.2.1, this section focuses only on R5.

![Figure 7-3: CRM Vision Relationships](image-url)
R5: The business case required alignment with the CRM vision. It is deemed essential to develop a clear business case, which is aligned with CRM vision to convince top management that the case is part of what has been agreed in the vision.

7.2.3 Relationships for Top Management

Four relationships were revealed that pertain to top management factors (See Figure 7.4); R2: the relationship with CRM strategy (cf. Section 7.2.1), R6: the relationship with the business case, R7: the relationship with a selection of the systems’ integrators, and R8: the relationship with business sponsorship. These relationships were essential to obtain the needed support, resources and budget from top management. These relationships and their roles are described as follows, with the exception of R2, which was explained in Section 7.2.1.

R6: The building of a business case is deemed necessary to obtain top management commitment for allocating sufficient budget, the required resources and needed support.
R7: Top management support played a major role in the selection of the system’s integrator via how much budget, support and resources were allocated to the project. Any limitation in the budget would affect the ability to select the right integrator. It is considered, therefore, extremely important to allocate the required budget to avoid the selection of the cheapest product/commodity, which could have a major negative impact on the success of the CRM project.

R8: Business sponsorship is deemed important since it has a positive impact on the success of the CRM project. To obtain full business sponsorship for the project, support and commitment from top management is needed.

7.2.4 Business Sponsorship Relationships

Eight relationships were revealed for business sponsorship factors (See Figure 7.5). These are R8: the relationship with top management commitment (cf. Section 7.2.3), R9: the relationship with building a business case, R10: the relationship with organisational change, R11: the relationship with collaboration, R13: the relationship with business needs, R14: the relationship with end user involvement, R20: the relationship with customer awareness, and R30: the relationship with data quality. These relationships and their impact are examined as follows, with exception of R8 as it was explained previously (cf. Section 7.2.3).
R9: Building a clear business case requires business sponsorship. Since the business is the main user of CRM application, sponsoring the project by them would help to identify a clear business case.

R10: Since most changes occur within the business’s functions, departments and people, self-sponsoring the project by the business would assist organisational change.

R11: Having the business lead the project will facilitate collaboration between business employees. This is considered very important as business personnel are the users of the CRM application.
R13: Identifying the needs and the requirements by the business people will be easier and more accurate if they were the sponsor of the project.

R14: If the business is responsible for the CRM project it will facilitate the involvement of the end user in all its stages as business personnel are the users of the CRM application.

R20: Since the business’s employees comprise the interface with their customers, having them sponsor the project would help to achieve better CRM awareness for customers. Businesses interact with customers through different channels on a daily bases, which allows them to measure the level of customer awareness and provide the required actions to raise their awareness.

R30: Since the business has data ownership, sponsoring the project can ultimately help to improve the quality of the data. Businesses have the authority and the channels for contacting customers for cleansing and completing their data.

7.2.5 System Integrator Selection Relationships

Four relationships were revealed for system integrator relationships (See Figure 7.6); R7: the relationship with top management commitment (cf. Section 7.2.3), R16: the relationship with software selection, R17: the relationship with external consultants, and R18: the relationship with vendor experts. These relationships and their roles are described as follows, with exception of R7, which was explained earlier (cf. Section 7.2.3).
R16: Selecting the CRM product would have an effect on the most suitable integrator capable of implementing the CRM product i.e. integrator capabilities and experiences are based on the type of CRM product.

R17: The involvement of an external consultants would ultimately affect the selection of the right system integrator i.e. the input and feedback of the consultant should help in selecting the best and most capable integrator.

R18: The involvement of product experts would ultimately have an effect on assuring the system integrator’s capability i.e. involving the experts who work with the product owner would help in reviewing and comparing the integrator’s work with the best practice.
7.2.6 Project Management Skills and Qualifications Relationships

Two relationships were identified for the project management skills and qualifications factor (See Figure 7.7); R12: the relationship with collaborations, and R19: the relationship with the project plan. These relationships were essential for improving teamwork among the project’s stakeholders and enhancement of the estimation for the project’s plan. These relationships and their impact are explained in the following sections.

R12: A qualified project management team would lead to better communication and collaboration between the project’s stakeholders. As the qualified team should have experience in handling one or more similar project.

R19: An estimation of the project plan is deemed important; however, this needs an experienced and qualified project management team.

7.2.7 End User Involvement Relationships

The findings of the research were revealed that three relationships pertain to end user involvement (See Figure 7.8); R14: the relationship with business sponsorship (cf. Section 7.2.4), R21: the relationship with the CRM champion, and R24: the
relationship with the awareness and training for the end users. These relationships and their role are described as follows with exception of R14 as it was explained previously (cf. Section 7.2.4).

R21: Having a CRM champion is based on the early involvement of the end users i.e. it is important to involve the end user in the early stage to use them as a champion for the project. The champion team should be well trained and aware so it is important to selecting them from the end user who involved earlier in the implementation.

R24: Early end user involvement in the project would facilitate the awareness and training of the end users. This will provide adequate time for the end user to be familiar with the CRM concept and application.

7.2.8 Business Needs Relationships

Three relationships were revealed from the factor associated with business needs (See Figure 7.9); R13: the relationship with business sponsorship (cf. Section 7.2.4), R22: the relationship with setting business priorities, and R23: the relationship with customer needs. These relationships and their role are examined in the following
sections, with exception of R13 which has been explained previously (cf. Section 7.2.4).

R22: Setting the priority for the business would be reliant on the finalising of the business needs and requirements. It is important that the business needs are fully identified and completed to get a full picture for prioritising these needs.

R23: The main aim of CRM implementation is to fulfil customers' needs. Any needs and requirements that are gathered should be built on the needs of customers. Thus, customer needs would ultimately have an effect on business needs.

7.2.9 Project Plan Relationships

The findings of the research revealed three relationships that pertain to the project plan factor (See Figure 7.10); R19: the relationship with project management skills and qualifications (cf. Section 7.2.6), R26: the relationship with the phased approach, and R27: the relationship with other system integration. These relationships and their impact are explained as follows, with exception of R19, which has been explained earlier (cf. Section 7.2.6).
R26: The phased approach for CRM implementation would have a positive effect on the project plan as it reduces workload, the risk of overlapping tasks and activities, and provides more time for the project’s stakeholders.

R27: The integration between the CRM application and other ones would have an effect on the finalisation of the project’s plan since every application has its own plan and it is difficult to align both plans.

7.2.10 Data Quality Relationships

Four relationships were identified with respect to the data quality factor (See Figure 7.11); R28: the relationship with policies and procedures, R29: the relationship with data privacy, R30: the relationship with business sponsorship (cf. Section 7.2.4), and R31: the relationship with customer culture. In order to improve the quality of data, it is crucial to adapt both country and company procedures, which encourage customers to provide their data. In addition, data privacy rules are considered essential to increase the confidence of customers to provide their data. Cultural factors need to be taken in consideration in order to avoid any barriers that prevent customers from
providing their data. These relationships and their role are further described as follows, with exception of R30, which was explained previously (cf. Section 7.2.4).

R28: Country and company policies and procedures have an effect on the quality of data i.e. lack of service offices for females, such as police and insurance companies, will discourage female customers from creating their accounts under their own names.

R29: Data privacy has an impact on the quality of data i.e. data privacy rules are extremely important for customers for increasing their confidence to provide data. Thus, if these rules are omitted this can negatively affect providing and sharing data with organisations.

R31: Customer cultural factors, such as religion, social norms’ aspects and the accessing of female data by men, could impact upon the quality of data (these cultural factors were the major reason for preventing some customers, especially female ones, from providing their data to organisations).
7.2.11 Organisational Change Relationships

Two relationships were revealed that pertain to the organisational change factor (See Figure 7.12); R10: the relationship with business sponsorship (cf. Section 7.2.4) and R15: the relationship with minimising customisation. The relationship with minimising customisation and its impact are described as follows with the exception of R10, which was explained previously (cf. Section 7.2.4).

R15: Reducing the percentage of product customisation would depend on organisational change i.e. changing the business process to fit the CRM product and thus reduce the percentage of customisation.

7.2.12 Software Selection Relationships

The findings of the research exposed two relationships related to software selection (See Figure 7.13); R25: the relationship with external consultants, and R16: the relationship with system integrator selection (cf. Section 7.2.5). The relationship with external consultants and its impact are described as follows with the exception of R16, which was explained previously (cf. Section 7.2.5).
R25: The external consultants’ involvement would have an effect on CRM product selection i.e. the external consultants experience should help in selecting the most appropriate CRM product.

7.3 The Relationships between CRM’s CSF and the Development Stages

As part of the main research question, the third sub-research question is to ascertain the connection between the CSFs of CRM and the key development stages. The researcher identified that each CSF needs to be considered within one or more stages, as shown in Table 6.3 and reproduced here as Table 7.2 for ease of reference. For instance, the data quality factor needed to be considered at an early stage during the implementation process in order to achieve an acceptable level of data quality before launching the CRM system. This is in agreement with what is described in Section 3.2 and by Sanad et al. (2010) whereby CSFs are hierarchical and should be applied at certain stages during the development stages. The key developments stages for CRM implementation and their associated CSFs are described in the following subsections.
7.3.1 The Assessment Stage

The assessment stage is where organisations need to validate their readiness for implementing their CRM solution. This is a new stage added by this research (cf. Section 6.5) to help organisations to check their readiness for CRM implementation.
Within this stage, it is deemed crucial that data privacy, customers' culture, and policies and procedures factors are considered in order to assess whether customers are likely to share their data with the organisation (cf. Sections 7.1.9, 7.1.10 and 7.1.11) and for companies seek improvements of those aspects under their area of control. This should improve the benefits associated with implementing CRM solutions for organisations. These factors require time to be addressed, and this should be taken into account before commencing CRM implementation.

**7.3.2 The Planning Stage**

The planning stage (cf. Section 2.7.1) follows the assessment phase whereby the organisation has validated the readiness for the CRM solution and has started to plan for its implementation. At this stage, twelve CSFs should be considered and practised (see Table 7.2). This is consistent with only seven factors mentioned in section 2.7.1; CRM strategy, Vision, success measurements, customer-centric strategy, and top management support to allocate the required budget, resources, and support.

At this stage, organisation should develop a customer-centric strategy that leads them to focus on customers rather than products and on this basis, a CRM strategy should be built to identify how the project will be implemented. The CRM strategy should be created as a result of both customer-centric and CRM vision. Customers' awareness, segmentation and involvement factors should be considered at the beginning of the planning stages. Sponsoring the project by the business should start earlier to develop a clear business case for convincing the top management to allocate the required
budget, resources and support. Clear CRM measurement factors should be created and used to indicate the degree of implementation success.

7.3.3 The Defining Stage

The defining stage is used to define the project scope, high-level business requirements, resources and CRM measurements (cf. Section 2.7.3). Under business sponsorship, CRM measurements, customer involvement and segmentation will be finalised at this stage to form the basis for business needs and priorities. Selecting the best CRM solution to meet the majority of a business’s requirements with the involvement and help of external consultants is the major task of this stage. Preparing a completed RFP for issuing to the different systems’ integrators, with the ultimate aim of awarding the best one, is deemed important during this stage. Vendor’s experts are necessary during this stage to verify the system’s integrator capabilities. This procedure ensures that the right integrator is selected who will deliver on time and within the budget. In addition, data quality control should start early as it needs time to reach an acceptable level. Early end user involvement and assigning a qualified and skilful project team is also deemed important during this stage as it could help to build better communications and collaboration between project stakeholders. Defining the scope of the integration that was needed with other systems is also considered important at this stage. The necessary support and resources are essential throughout the whole period of the project.
7.3.4 The Discovery Stage

During the discovery stage (cf. Section 2.7.3), which is a step down below the defining stage, there is the need for an in-depth collection of detailed business requirements. Similar factors germane to the previous stage would continue throughout this one except five factors (software selection, vendor experts, CRM measurements, customer involvement, and segmentation) that supposed to be finalised in the previous stage (see Table 7.2). Two factors pertain to generating the project plan, and preparing the organisation for the changes required for CRM implementation should be start at this stage. Only three factors were exist in the literature at this stage; business needs (cf. Sections 2.7.3), external consultants (cf. Sections 2.7.3.2) and phased approach (cf. Sections 2.7.3.3).

7.3.5 The Design Stage

The design stage (cf. Section 2.7.4) includes detailed specifications, which represent the business requirements as well as a base for the construction stage. During this stage, there is the execution of end user training and awareness and assigning the CRM champion to help to increase the buy-in for the project. Reducing the customisation of the application should start at this stage by designing the application to meet best practice. Other factors from previous stages would be continued, except six factors (project plan, business sponsorship, set business priorities, business needs, team qualification and skills, system integrator selection) that supposed to be finalised in the previous stage as shown in Table 7.2. Only two factors were exist in the literature at this stage (cf. Sections 2.7.4); external consultants, end user training.
7.3.6 The Construction Stage

The construction stage is used to construct what has been previously designed (cf. Section 2.7.5). During this stage, the factors from the previous one are brought forward except external consultant that supposed to be finalised in the previous stage (see Table 7.2). Vendor’s expert involvement for reviewing and auditing the integrator's work is vital to start again at this stage. Only four factors were exist in the literature at this stage (cf. Sections 2.7.5); vendor experts, end user training, organisational change, and minimising customisation.

7.3.7 The Validation Stage

The validation stage (cf. Section 2.7.6) is the one before deployment whereby the CRM application sponsor needs to test and validate the whole system before it goes live into the production environment. The same factors that were used during construction stage are considered here together with extra three new ones; business sponsorship, end user involvement, and team qualification and skills as presented in Table 7.2.

7.3.8 The Deployment Stage

The deployment stage (cf. Section 2.7.7) is the one when the application moves from the testing to the production environment. Here, all the factors used in the previous stages are considered together with three addition ones: a CRM measurement factor to measure the success of CRM implementation, customer involvement and awareness for preparing customer for the new solution and process. Only two factors were exist
in the literature at this stage (cf. Sections 2.7.7); end user training, and organisational change.

7.4 CRM and Institutional Theory

Part of the second sub-question was designed to address the reasons for the differences that exist between CSFs of CRM implementation within developed countries and those acting within the private sector of the KSA. It has been observed that the major difference, as revealed in Sections 6.4 and 7.1, pertains to culture, which has been shown to be the core category since it affects other ones (cf. Figure 6.2). As aforementioned in Sections 4.3.1 and 4.4, the research is inductive where the data leads to theory. The research followed the interpretive paradigm (cf. Section 4.2.4) and integrated case study and Grounded Theory as a research strategy (cf. Section 4.4). The researcher, therefore, aimed to scale up and be theoretically sensitive (cf. Sections 4.7.1.1) in order to select a theory that can achieve a wider explanation and understanding of the cultural impact pertaining to the success of CRM implementation. This is called theoretical integration (cf. Sections 4.7.1.1 and 4.7.1.2). It was used to complete the final part of applying Grounded Theory (cf. Sections 6.1 and 4.7.1.2) with the ultimate aim of examining the research’s findings into the context of other theories, such as Institutional Theory, for a better explanation, understanding, forecasting and testing (Gregor, 2006; Urquhart et al., 2010). This should produce an extensive explanation and a better synthesis of the research’s findings.
Urquhart et al. (2010) have suggested some theories that could be used in IS to achieve theoretical integration. The researcher has discovered that there are approximately 85 theories that can be applied in IS studies (IS Theory, 2012). Institutional Theory was selected for this research as it deals with the different characteristics of cultural aspects, such as behaviour, morals, politics, economics, social life and legal aspects (Scott, 2008; Weerakkody et al., 2009). In addition, institutions have the ability to govern and constrain behaviour at different levels, from world systems, including organisations, to users and customers of those systems (Scott, 2008) (cf. Section 7.4.1.1). Institutional Theory deals with different types of organisations (Scott, 2001). A number of studies have adopted an Institutional Theory to examine IT solutions. These studies include those of Barley and Tolbert (1997), Butler (2003), Teo et al. (2003), Lai et al. (2006), Currie and Guah (2007), Liang et al. (2007), Currie (2009), Svejvig (2009), and Svejvig and Pries-Heje (2011). However, only a few studies have examined CRM Firth and Lawrence (2006), Chen and Wang (2006), and Hillebrand et al. (2011). These studies have gained a wider explanation for their findings by applying Institutional Theory, and their researcher’s recommend continuing the research by applying it to explore IS implementation. Furthermore, many early CRM studies within the existing literature have focused on the organisation level, thereby ignoring the individual (micro) and social (macro) ones. The application of Institutional Theory should not be limited to solely the cultural aspects; a research’s findings should extensively cover all the aspects, which may affect the success of CRM implementations.
The researcher acknowledges that other theories that seek to explain culture aspects with regard to IS could be applied to achieve theoretical integration (Urquhart et al., 2010) for this research. Reviewing and applying other appropriate theories should form part of further research and investigation.

This section presents a critical discussion of the use of Institutional Theory to explore CRM implementation. The first section explains some of the topics that relate to Institutional Theory. The second discusses the application of Institutional Theory for CRM implementation within the context of the current research.

7.4.1 Institutional Theory Literature

Scott (2008) defined Institutional Theory as:

"Comprised of regulative, normative and cultural-cognitive elements that together with associated activities and resources, provide stability and meaning to social life." (p.48)

An institution is a social structure, which gives organisations or the individual different lines of action or orientations but also controls and constrains them (Barley and Tolbert, 1997).

This section explains the key concepts related to Institutional Theory, institution and culture, organisational field, multiple levels in Institutional Theory, institutional logics, institutional isomorphism and competitive pressure.
7.4.1.1 Institutions and Culture

Institutional Theory has revealed the existence of the cultural power of values, norms, rules, beliefs and assumptions that are ingrained within the form, procedures and the structure that is generated by both organisations and individuals when responding to IT implementation (Barley and Tolbert, 1997). A definition by King et al. (1994) revealed that different stakeholders participate over time in shaping institutions. Social institution can be described as:

“A regularity in social behaviour that is agreed to by all members of society, specifies behaviour in specific recurrent situations and is either self-policed or policed by some external authority” (Schotter 1981, p. 11).

Social interactions gradually construct the norms and morals of the ‘society’, which in the end are taken for granted facts that represent the institutions of the society, its organisation and actors (Barley and Tolbert, 1997). Institutional Theory deals with the embedded influence of institutions, such as rules, routines and norms, which are led by societal and individual behaviour (Svejvig, 2009). Examples of institutions are "human rights, societies, enterprise systems, families, handshakes and belief systems like Buddhism" (Svejvig 2009, p. 8).

In addition, Institutional Theory has been useful in exploring customers’ cultures concerning IT solutions, such as web-based applications (Butler, 2003). The theory emphasises the role of social processes and norms in explaining the behaviour of the organisation and its customers (Hillebrand et al., 2011).
7.4.1.2 Organisational Field

Organisational field is defined as those organisations that together comprise:

"A recognised area of institutional life: key suppliers, resource and product consumers, regulatory agencies and other organisations that produce similar services or products." (DiMaggio and Powell 1991, p. 64)

In short, it refers to the different organisations working in a similar function or field (Scott, 2001).

7.4.1.3 Multiple Levels in Institutional Theory

The pressures associated with Institutional Theory range from societal to individual and this important feature provides for a wider explanation within Institutional Theory analysis (Scott, 2008; Svejvig, 2009). Multiple levels can be defined as:

"Interaction between levels, where macro structures in societal are bridged by organisational fields to micro structures in organisations or even down to the individual actor level." (Svejvig 2009, p. 12)

The institution is generated and distributed when the top-down pressure (macro level), which comes from the higher societal level is passed to the individual at a lower level and shapes the forms and actions of personal level processes. In contrast, bottom-top pressure (micro level) is the result of the process, which involves individual beliefs, norms and morals; all of which influence the top level, such as the organisation, the
organisational field or the society (Scott, 2008). This should encourage IS studies to cover different levels and different stakeholders (Currie, 2009). Soh and Sia (2004) did exactly this concerning ERP adoption in three Singaporean case studies, looking at the pressures which were derived from different levels of inspection.

7.4.1.4 Institutional Logics

Institutional logics have been defined as:

"A set of material practices and symbolic constructions, which constitutes its organising principles and is available to organisations and individuals to elaborate."

(Friedland and Alford 1991, p. 248)

Thornton and Ocasio (2008) have provided another generic definition when they said that institutional logics are about:

“The way a particular social world works.” (p. 100)

Institutional logics can be referred to,

“The belief systems and are related to practices that predominate in an organisational field.” (Scott 2001, p. 139)

It is important that institutional logics of the IT systems be aligned with those of organisations to avoid conflict and reduce resistance (Gosain, 2004). There a need to consider the institutional logics of organisational users (Fligstein, 2001). This is
because they are the key players in adopting technology (Svejvig, 2009). Institutional logics form the norms, values and behaviour of different institutions, such as customers, organisations and society, through which interactions occur (Thornton and Ocasio, 2008).

### 7.4.1.5 Isomorphism: Institutional pressures

During the 1970s, a new aspect of Institutional Theory emerged, which emphasised culture; the concept of isomorphism (Meyer and Rowan, 1977; Zucker, 1977; Barley and Tolbert, 1997 and Weerakkody et al., 2009). Isomorphism has been defined as: “A constraining process that forces one unit in a population to resemble other units that face the same set of environmental conditions.” (DiMaggio and Powell 1983, p. 149)

The focus on isomorphism shifted attention from the society stage to that of the organisational one, with three types of institutional pressures. The pressures were coercive, normative and mimetic, which provided the basis for many institutional analyses (DiMaggio and Powell, 1983; DiMaggio and Powell, 1991; Scott, 2001; Scott, 2008). Consequently, different organisations functioning in different environments become similar in structure as they follow the same constraints in their processes and environment (Tolbert and Zucker, 1994).

Institutional pressure can arise from the external environment, such as the government sector, regulators, consulting companies, business standards and other stakeholder, for
example, customers (Wang and Cheung, 2004). Liang et al. (2007) has argued that isomorphism pressures impact on the adaptation of enterprise systems.

Mimetic pressure has been defined as a pressure, which guides an organisation to be like other organisations by copying their ways of facilitating business (DiMaggio and Powell, 1991). There are two drivers for mimetic pressures. One is to copy other organisations in the same field and the second is to benchmark successful organisations who have implemented the same practice (Haveman, 1993). Mimetic isomorphism occurs with the ultimate aim of improving organisational efficiency and effectiveness (Wang and Cheung, 2004; Hillebrand et al., 2011). Adopting an IT solution without mimetic pressures is most likely to improve meeting the objectives and achieving the benefits of the adoption (Ansari et al., 2010). For instance, Westphal et al. (1997) found that those hospitals driven by mimetic pressure for implementing Total Quality Management (TQM) were unlikely to recognise the benefits of the implementation.

In addition, adoption of the solution due to mimetic pressures will move the focuses on the CRM implementation to understanding the strategy, the vision and the legitimating of the copied organisation. In this case, is more likely to increase the risk of failure in the CRM adoption (Staw and Epstein, 2000; Boiral, 2007).

Normative pressure can be viewed as:

"Imposing constraints on social behaviour." (Scott 2008, p. 54)
It comprises values and norms. Values are principles and morals, while norms identify how things should be done (Scott, 2008). In organisations, normative pressure is the rules and standards recommended by a third party, such as a consultant company or product vendor to be followed by organisations in order to improve their effectiveness and efficiency (Lai et al., 2006; Scott, 2008). Examples for normative pressure are standards, best practice, benchmarks or Business Process Re-engineering (BPR) that are recommended by consulting companies or product vendors (Robey and Boudreau, 1999; Mignerat and Rivard, 2009). This type of pressure can lead the organisation to implement an IT solution without performing a sufficient cost-benefit analysis for it (Hillebrand et al., 2011).

Finally, coercive pressure has been defined by Mignerat and Rivard (2009, p. 2) as a pressure that:

"Arise[s] from the legal environment of the organisation and through the existence of standards, which can be imposed by structures on which the focal organisation is dependent."

This type of pressure can be formal, such as via a regulator, or informal, such as that pertaining to societal principles (Scott, 2008). Government, regulatory agencies, customers and parent companies are all examples of coercive pressures (Mignerat and Rivard, 2009).
7.4.1.6 Competitive Pressure

Competitive pressure is another important cause of isomorphism (Scott, 2008), which was added by DiMaggio and Powell (1983). It can be defined as:

"The pressure that arises from the threat of losing competitive advantage forces firms to search for alternatives to their current strategies." (Wang and Cheung 2004, p. 44)

Organisations tend to adopt an advanced system in response to competitive pressures, regardless of whether it is going to achieve organisation objectives, such as increasing the number of customers and gaining better revenue (Scott and Meyer, 1991).

7.4.2 Discussion for Applying Institutional Theory on CRM implementation

A range of topics related to Institutional Theory have been described in the previous section of this thesis; institution and culture, organisational field, multiple levels in Institutional Theory, institutional logics, institutional isomorphism and competitive pressures.

In general, using Institutional Theory in this research extends the existing literature on CRM by examining the institutions pertaining to the societal down to the individual level, which affects CRM implementation. In addition, it allows investigation of institutional pressures that lead to isomorphism from a wider societal and inter-organisational context not simply at the level of the organisation or business unit but from the perspective of the individual (Weill and Vitale, 2001; Scott, 2008; Currie,
The following discussion draws upon these topics within Institutional Theory in order to explain in a rich way the findings of this research.

### 7.4.2.1 Institution and cultural

As aforementioned in Section 7.4, the findings of this research have revealed that the culture of customers and organisations have a major impact on the success of CRM implementation.

In fact, an IT solution, such as CRM, has its own institutions, which are contained within institutional logics (cf. Section 7.4.1.4). This involves norms, morals, rules, assumptions and values, which lead to certain actions and procedures that pressurise the organisation's existing institutional logics to be adapted with new rules for running the business and its customer services. This pressure is extended to cover the institutional logics of societies and its customers, particularly in countries who are not producers of the IT solution, which therefore can cause a mismatch between the two institutional logics.

By deploying such a solution, one is likely to encounter resistance from organisational institutional logics, which are represented by the sanctioning and legitimating that has existed for a long time and to deal with institutional logics that are represented in the societal and by customers, such as norms, beliefs and values, which have already existed for many decades.
Institutional Theory is intended to provide a broader structural way of addressing how the institutional logics, which are embedded within the CRM solution, deal with the institutional logics that already exist in the country, including the societal institution (as a macro level), organisational field (as a medium level) and customers (as a micro level) (cf. Section 7.4.1.3).

By implementing technology, the organisation’s business process should indicate that it is appropriate, aligned and acceptable to institutional logics in the workplace (Orlikowski and Robey, 1991). In reality, however, this has not always been the case as shown by the research’s findings.

As revealed in Figure 7.14, at the macro level the social structures and activities have provided a wider environment for the organisational field (Scott, 2008). In the KSA, there has been an absence of the required environment for the organisational field, such as a lack of country policies and procedures as evidenced in a paucity of services for women in both the public and private sector. In addition, there have been socialisation sanctions, which have been imposed by societal institutions on customers that have created conservative institutional logics in terms of norms, beliefs, morals, values and religion. Conservative institutional logics that pertain to customers are in mismatch with the institutional logics of CRM solutions, such as rejecting to give personal data, which has created resistance at the micro level for CRM adoption in organisations. These have increased the potential failure for CRM adoption.
7.4.2.2 CRM Adoption: Institutional Isomorphism and Competitive Pressures

This section discusses the impact of institutional isomorphism and competitive pressures on CRM adoption. It can be observed that normative pressure was found in all cases within the fieldwork undertaken. Competitive pressure was found in only three cases; STC, Al-Rajhi Bank and Toyota where they are market leaders in their own business field. In contrast, only two cases; Albilad bank and SAPTCO were found under mimetic pressure, as they are followers in their field of business. Finally, coercive pressure was found in three of the cases; Al-Rajhi bank, Albilad Bank and STC where SAMA and the telecom regulator are the producers for this pressure.
**Normative Pressures (all five cases)**

It can be observed that as part of normative pressure (cf. Section 7.4.1.5), all the five cases have been charged to transfer their business processes from being product-centric to customer-centric and this has been the main driver for CRM implementation. A CRM vendor, such as Oracle (American company) emphasised that CRM is the solution, which can help organisations to become more customer-centric. In addition, CRM vendors rely on consulting company conferences, reports and journals to show the advanced position of their CRM products. Consulting companies have shown a positive view of CRM implementation by linking it to the success of achieving organisational objectives. CRM vendors utilise such reports to encourage IT people to implement CRM solutions. Moreover, they provide free conference passes, travel tickets and accommodation for employees of both IT and business companies in order to convince them to adopt a CRM solution. This kind of pressure commences at the working level and moves upwards to top management, pressurising them to implement CRM solutions even if it was not part of their original organisation strategy. This pressure can push CRM implementation without studying its feasibility (cf. Section 7.4.1.5).

The findings of all five companies revealed that IT people were using the reports of consulting companies as a basis for convincing top management to adopt CRM. Vested interests between consulting companies and CRM vendors have resulted in a biased evaluation of CRM solutions. For instance, CRM vendors normally sponsor the summits, symposiums and conferences for consulting companies.
Mimetic Pressure (Albilad bank and SAPTCO)

As described in Section 7.4.1.5 by Hillebrand et al. (2011), mimetic pressure occur when an organisation copies the characteristics of another, such as their behaviour, structure and technology. It has been observed that two organisations were subject a certain amount of mimetic pressure for implementing a CRM solution. The Al-Rajhi bank was established two decades before the Albilad bank but the former was the first bank to apply Islamic financial law. The Albilad bank attempted to copy the structure, business processes and technology of the Al-Rajhi bank. This situation generates a mimetic driver whereby one organisation in the same field of business copies another (cf. Section 7.4.1.5). This created pressure on the Albilad bank to implement CRM without considering the cost-benefits of its implementation (Hillebrand et al., 2011).

The second case was SAPTCO when they benchmarked STC’s CRM implementation since the latter was the leader in adopting technology. This was another type of mimetic driver used to copy another organisation as a benchmark (cf. Section 7.4.1.5). Similar to the Albilad case, SAPTCO adopted the CRM solution without sufficiently studying its feasibility.

Competitive Pressure (STC, Toyota and Al-Rajhi bank)

Competition is another pressure for isomorphism (cf. Section 7.4.1.6). Intense competitions create pressure on organisations to achieve a competitive advantage within the market in order to obtain a greater number of customers and gain better revenue. This kind of pressure was observed by researcher with regards to three cases; STC, Toyota and Al-Rajhi bank. All three organisations are leaders in their business
field, which placed significant pressure on them to maintain their position in the market. In STC, case, since the government killed the monopoly of the telecom market and licenses were provided for several companies to operate, the main objective of STC was to achieve a competitive advantage amongst new competitors. This created pressure for STC to implement a CRM solution that would enable them to gain this edge. This pressure was also observed in the Al-Rajhi bank, when other banks applied financial Islamic law to some of their banking services including new banks such as Albilad who completely followed financial Islamic law in all of its banking services. This created serious pressure for Al-Rajhi to adopt a CRM solution as their latest technology to sustain their leader position in the market. Similar pressure was observed upon the Toyota company, which was directed towards the implementation of a CRM solution in order to achieve a competitive advantage. This situation was similar to others described above where the implementation of CRM was a response to pressure rather than organisational strategy.

**Coercive Pressure (Al-Rajhi bank, Albilad Bank and STC)**

There are two regulators for the two different sectors: one for telecoms and the other for banking (SAMA). In fact, they are under the jurisdiction of the public sector, and related to the Ministry of Information and Communication and the Ministry of Finance respectively. They are principally responsible for setting polices and rules for the business, issuing licences for business operations, organising the level of service for customers, eliminating monopoly in the market and generating an environment of fear for competition. Ribeiro and Scapens (2006, p. 6) said:
"The government and its agency can be a source of coercive pressures."

The telecoms regulator has power over the activities of telecom companies, such as market campaigns and service prices. The telecom regulator requested all telecom companies to provide better services for their customers, to manage customers' complaints and assure the quality of customers' data. This created a top-down pressure on STC to look for a complete solution to address such requirements. The solution that was selected by STC was CRM implementation to show their serious commitment to the requirements of the telecom regulator.

Mignerat and Rivard (2009) explicitly reveal that regulatory agencies are a source of coercive pressure that is known as formal pressure (cf. Section 7.4.1.5). SAMA has played a similar role in managing the banks in the KSA, such as issuing licences and establishing policies and rules for the market. In addition, SAMA applied top-down pressure on the Al-Rajhi and Albilad banks to improve their customer services and better handle customer complaints. Consequently, the Al-Rajhi and Albilad banks have implemented a CRM solution with the ultimate aim of meeting regulatory requirements.

The question of whether institutional isomorphism and competitive pressures are potentially beneficial for CRM adoption can now be examined.

Based on the discussion, it is observable that different pressures exist within different organisations (see Figure 7.15). This has frequently led to CRM solutions being
implemented without conducting a cost-benefit analysis or at least without a clear business case showing that a CRM solution could help meet organisational objectives. Furthermore, CRM implementations free from pressure will be most probably less risky as it relies upon the organisation’s objectives and needs that consider the culture of the organisation and their customers (Orlikowski and Robey, 1991). Institutional isomorphism and competitive pressures focus on the creation of external motivations for adopting CRM, instead of actually creating internal enthusiasm that is part of the organisation’s strategy, which is able to generate a customer-centric position that influences CRM effectiveness. In fact, social pressures normally have a negative impact on an organisation’s practice (Ansari et al., 2010; Westphal et al., 1997).

This view is supported by an empirical study of 107 organisations to explore mimetic pressure on CRM implementation, which revealed that implementing CRM due to mimetic pressure resulted in less customer satisfaction (Hillebrand et al., 2011).
In brief, Figure 7.16 extended Figure 7.14 to reveal that organisations within the private sector of the KSA that implemented CRM solutions were responding to isomorphism pressures (cf. Section 7.4.22) without performing sufficient cost-benefit analysis based on internal drivers and needs. Organisations had not considered the conflict between the conservative institution logics of both organisations and customers shaped by societal institutional and the institution logics of the CRM application that is shaped by western traditions, which created a resistance at the
micro level (customers) for CRM adoption within organisations and increased the potential failure of CRM adoption.

What seems to be missing here is a lack of user involvement in CRM implementations. User involvement used to be considered a main source for identifying the requirements of in-house software development (Howcroft and Light, 2002). In the 1990s, and particularly since COTS solutions and readymade packages have been widely adopted by organisations, user involvement in IS developments has declined dramatically (Howcroft and Light, 2002). This causes more resistance from the users, a lack of meeting their needs, and a poorer understanding of their culture.
and its impact on development. The current research appears to re-affirm, given that a CRM system is a one type of IS implementation, the importance of not neglecting the user in the development of IS. This finding finds support in the work of Al-Mashari et. al (2003) and of Svejvig (2009), both of whom confirmed user involvement to be a CSF within ERP systems; another type of IS implementation. Other researchers have also found user involvement to be critical to CRM and KM systems (Silva and Rahimi, 2003; Al-Ajlun and Zairi, 2005; Chen and Wang, 2006; Alsadhan, 2007), providing further support to above mentioned re-affirmation.

User involvement should embrace all external users of an IS, so not just including the organisations implementing the systems but also their customers (Al-Ajlun and Zairi, 2005), be they individuals or other organisations in the supply chain (Al-Mashari et. al, 2003). If we make systems for customers, why don’t we ask customers what’s needed? This should help implementing COTS solutions based on customers’ needs and requirements and not as a respond to isomorphism pressures (cf. Section 7.4.2.2).

### 7.5 An Integrated Model to support CRM Implementation

The result of this research is an integrated model that supports CRM implementation by identifying the CSFs and their interrelationships that affects the adoption of a CRM solution from both the organisations and their customers' perspectives within the private sector of the KSA. In addition, the model revealed the relationships between key development stages and CRM’s CSFs. Institutional analysis was achieved. Figure 7.17 demonstrates the research model according to the research’s findings and analysis. All of the issues presented in the model were discussed in
Chapters 6 and 7. The interrelationships between CSFs (cf. Sections 6.5 and 7.2) are presented in Figures 6.3 or 7.1. Due to limited space the model cannot be presented in its entirety on one page. In this model, (see Figure 7.17) the researcher showed two separate groups that represent CRM’s CSFs from the organisations and their customer perspectives (cf. Sections 6.2, 6.3 and 7.1). These CSFs should be considered at certain stages of CRM development (cf. Sections 6.6 and 7.3). Also these CSFs are interlinked and connected together and need to occur in a dependency mode (cf. Sections 6.5 and 7.2). Organisations should implement CRM based on internal drivers and needs and sufficient cost-benefit analysis rather than responding to isomorphism pressures (cf. Section 7.4.2.2). Organisations that plan to implement CRM solutions within private sector of the KSA should be aware of the following caveat. The institution logics of both organisations and customers are shaped by societal institutions but are mismatch with the institution logics of CRM application that are moulded by western traditions. This has created resistance at the micro level (customers) for CRM adoption in organisations and increased the potential failure of CRM adoption.

7.6 Conclusion

This chapter has presented a critical discussion of the research findings and outcomes by comparing them with the existing literature. It provides an answer to the research questions (cf. Section 1.3). A wider theoretical explanation for the findings has been achieved by applying Institutional Theory. From the results of the analysis, an integrated model for supporting effective CRM implementation is demonstrated and
explained. The next chapter will provide a conclusion and recommendations as well as discussing the limitations of the current research.
Chapter Seven

**Discussion**

Imposition of policies and procedures

Organisational Field (Regulators)

Coercive pressure (need to be avoided as CRM motivation)

Based on internal motivation

**Drivers for CRM Implementation**

- Business-Driven
  - CRM vision (P)
  - Building a business case (P)
  - Business Sponsorship (P,D,Di,V&Y)
  - Set business priorities (D&Di)
  - Business needs (D&Di)

- Societal Institutional
  - Team qualifications (D, Di,V & Y)
  - Collaboration (D, Di, De,C,V & Y)
  - Integration (D, Di, De,C,V & Y)

- Project Management
  - Project Plan ( Di)
  - Minimize Customization (De,C&V)
  - Phased Approach (Di, De,C,V & Y)

- Organisational Culture
  - Organisational Change (Di, De ,C,V & Y)
  - CRM Strategy (P)
  - Developing customer-centric strategy (P)

- Top Management
  - Commitment
    - Budget Allocation (P)
    - Receiving Needed Supports (P,D, Di, De,C,V & Y)
    - Assigning the Right Resources (P,D, Di, De,C,V & Y)

- Technology
  - Software selection (D)
  - Vendor experts (D,V&C)
  - External Consultants (D,Di,De)
  - Systems integrator selection (D,Di)

- Data Quality (D, Di, De,C,V & Y)
  - Data Completion
  - Data Cleansing

- CRM Awareness
  - End user involvement (D,Di,V&Y)
  - Customers’ Awareness (P,Y)
  - End User Training & Awareness (De,C,V & Y)
  - CRM Champion (D,Di,C,V&Y)

- CRM Success Measurements
  - Customer’s Turnover (P,D)
  - Customers’ Increasing
  - Customers’ Satisfaction
  - Meeting business objectives
  - Finish on time & budget

**Institutional Pressures:**

- Coercive Pressure
- Mimetic Pressure
- Normative Pressure
- Competitive Pressure

CSFs need to be considered in certain stages and dependency mode (cf. Figure 6.3 & 6.5)

Need to consider the mismatch of institutional logics of customer that imposed social sanctions and institutional logics of CRM solution that imposed by western organisations

**Customers**

- Customer Culture (A)
  - Social Norms
  - Religion
  - Accessing Female Data by Male

- Data Privacy (A)
  - Data Sharing and Access
  - Customers Trust
  - Data Confidentiality

- Policies & Procedures (A)
  - Female Services
  - Legality

- Customer Needs
  - Customers’ Segmentation (P,D)
  - Customers’ Involvement (P,D)

**Key Development Stages for CRM Adoption**

- Assessment (A)
- Planning (P)
- Define (D)
- Discover (Di)
- Design (De)
- Construction (C)
- Validation (V)
- Deployment (Y)

Figure 7-17: An Integrated Model to Support CRM Implementation within the private sector of the KSA

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Chapter Eight: Conclusion and Recommendations

This chapter presents conclusions and recommendations of the research. It identifies the research’s main contributions, limitations and suggests directions for further research. The chapter also evaluates the quality of the research process as well as providing a summary of the whole research.

8.1 The Main Research Contribution

The research has contributed in a number of ways, which are described below:

1. A theoretical contribution was made by applying Institutional Theory (cf. Section 7.4) as part of a theoretical integration (cf. Sections 4.7.1.1 and 4.7.1.2), which was used to scale up the findings and look for a ‘theoretical lens’ to enrich the understanding and interpretation of them. This approach has provided useful insights and comments upon the main factors that affect the adoption of CRM. It was found that organisations under different institutional isomorphism pressures (cf. Section 7.4.2.2 and Figures 7.14 and 7.16) led to CRM implementation without the advantage of a cost-benefit analysis or at least a clear business case showing that a CRM solution could help meet their objectives. Moreover, implementing a CRM solution as a response to institutional isomorphism pressures could lead to a conflict and mismatch of institutional logics among customers and CRM solutions. As aforementioned in Section 7.4.2.1, in the KSA there has been an absence of the required environment for the organisational field, such as a lack of country policies and procedures, as evidenced by a deficiency of services for women in both the public and private sectors. As observed from Figure 7.14 and 7.16, there are socialisation
sanctions imposed by societal institutions on customers that have created conservative institutional logics in terms of norms, beliefs, morals, values and religion. Conservative institutional logics pertaining to customers have been mismatched with those of CRM solutions, such as rejecting personal data to be given and shared with organisations, which has created resistance at the micro level for CRM adoption. These have increased the potential failure of CRM adoption.

These results could not have been reached without the application of Institutional Theory. Consequently, this research extends the body of research knowledge on the application of Institutional Theory to study the adoption and implementation of IS in organisations and in particular CRM solutions within the private sector in the KSA.

The results from apply Institutional Theory to CRM also serves to highlight a lesson for IS in general, namely the importance of not neglecting the user in IS development activities. If we make systems for customers, why don’t we ask customers what’s needed? This should help implement COTS solutions based on customers’ needs and requirements, and not as a response to isomorphism pressures (cf. Section 7.4.2.2). However, further research needs to be undertaken to identify how to re-invigorate the issue (cf. Section 8.3).

2. Another contribution is the development of the research model that presents the CSFs and their interrelationships that affect the adoption of CRM solutions within the private sector in the KSA (see Figure 7.17). This model combines and integrates the views of these organisations and their customers. No research exists that considers
customers’ perspectives or combines organisations and their customers’ viewpoints in CRM implementation studies. Some of the CSFs presented by the model are similar to those reported by the literature. Furthermore, customer culture, and country’s policies and procedures, are new CSFs found to be specifically related to this investigation.

3. An important contribution made by this research is that it has identified thirty-one cause-effect relationships between CSFs as presented in Figure 6.3 (cf. Sections 6.5 and 7.2). As CSFs are both interdependent and influence each other, these relationships are deemed important and they need to occur in a dependency mode. For instance if Y and X are two factors that depend on each other, then Y can be achieved successfully only if X exists and supports Y. For example, successful budget allocation is based on building a quality business case. Organisations that have no clear business case that demonstrates the benefits of implementing CRM will face difficulty in defending the allocation of the required resources and support. This will affect the success of CRM implementation.

4. Another important contribution made by this research is that it identified that each CSF needs to be executed in certain CRM development stages as shown in Tables 6.3 or 7.2 (cf. Section 7.3). CSFs are hierarchical and should be applied at certain stages during the CRM development life cycle; otherwise, it could negatively affect the success of their implementation (cf. Section 3.2).

5. Practically, this research provides organisations within the private sector of the KSA (those that intend to implement CRM solutions) with an extensive way of
thinking about its many issues starting from their customers’ points of view. Customers’ perspectives showed how culture, policies, procedures and data privacy CSFs could prevent them, particularly females, from giving and sharing personal information with organisations (cf. Sections 6.2.7 and 7.4.2.1). In addition, it is important for organisations to consider that CSFs are interlinked and connected together and need to occur in a dependency mode (cf. Section 7.2). Another important concern that needs to be considered by organisations is that CSFs are hierarchical and have to occur in certain CRM development stages (cf. Section 7.3). Finally, CRM implementation by organisations should not be in response to corrective, mimetic, normative and competitive pressures (cf. Section 7.4.2) but to their strategies and needs and after a clear business case has been established that includes a sufficiently thorough cost-benefit analysis.

6. Finally, this research is the one of the very limited number of research regarding the implementation of CRM solutions within the private sector of the KSA. As a result, the outcomes of this research and those specifically from the Saudi case studies (as an example of the developing world) contribute to the existing body of knowledge on CSFs that affect the adoption and implementation of CRM.

8.2 Research Limitations

Due to time, resources and limited access, any research study has its limitations. For this research, the limitations are as follows.
1. This research is restricted to the KSA. Therefore, the results of the study cannot be generalised to any other population. The research instead aimed to explore a particular problem under a specified condition with the potential to generalise only to the current context.

2. The current research is located and embedded in the private sector. It would be interesting to extend the research to cover the public sector and exercise if similar or different success emerges.

3. Selecting Institutional Theory to achieve theoretical integration was not based on thoroughly evaluating theories applied to IS. As 85 theories (IS Theory, 2012) can be applied to IS studies, there may be many more theories that could provide additional insight into aspects relating to the core category (culture) (cf. Section 6.4).

4. The five case studies adopted within this research were large organisations within four large industry sectors. It is acknowledged that these may not represent the whole private sector of the KSA: additional empirical research on other organisations from different sizes and sectors needs to be undertaken to ensure that the results of the research effectively represent the whole private sector of the KSA.

8.3 Future Research

The demands by organisations for CRM implementation are expected to rise. The following are some suggestions for areas of further research based upon the findings of this research.
1. The model of factors and their interrelationships presented in Figure 7.17 could be tested and evaluated by other researchers, particularly in other developing countries where they face similar problems with CRM implementation. This can be achieved by using quantitative data analysis to create statistically significant results and identifying the level of criticality of CRM’s CSFs and their interrelationships.

2. Further qualitative research could be conducted by applying the same research strategy as followed here but using another theory to complete theoretical integration in order to obtain a further explanation for the affect of culture (core category) on CRM implementation, which is expected to contribute and extend the body of knowledge.

3. Another area for further qualitative research could be carried out by applying the same research strategy followed here to conduct a comparative study of two developing countries and compare the factors that emerge to identify any commonalities/differences, which would be considered a contribution to the academic knowledge.

4. The research focused on the private and neglected the public sector. The latter could offer the potential to identify factors that pertain to the public sector and compare them with what has emerged from this research and identify any contribution.
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5. Another valuable area for future research would be to consider the views and perceptions of CRM customers including their awareness of CRM solutions within developed countries, which may extract new factors not considered earlier.

6. As the research focused on five case studies of large organisations, the study did not cover all types and sizes of the organisations. It would be interesting to investigate smaller organisations that implement CRM systems and for organisations within other industry sectors within the private sector of the KSA.

7. Further research could be conducted by applying a different research strategy (e.g., a survey) that allows the researcher to hypothesise the presence of any CSFs and their interrelationships that already exist in the literature yet were not found explicitly within this research.

8. This research focused on the differences between the CRM’s CSFs within the KSA and those of developed countries. It is worthwhile to investigate the similarity of CSFs and investigate how different a culture is KSA to those of developed countries: for instance, are the similarities/differences in CSFs more to do with the cultures of the communities that lie within a country rather than with the country itself?

9. This research revealed the importance of implementing COTS solutions based on customers’ needs and requirements, and not as a response to isomorphism pressures (cf. Section 7.4.2.2). Further research needs to be undertaken to determine how to most effectively re-invigorate this issue.
8.4 Research Evaluation

As aforementioned in Section 4.9, Lincoln and Guba (1985) offer evaluation criteria for interpretive qualitative research. These criteria can be used to evaluate the quality of this research as follows:

8.4.1 Credibility

The research subject, the research questions, the unit of analysis, the main and the secondary sources for the data collection for both organisations and customers were identified and investigated. As part of Grounded Theory procedures, theoretical and purposeful sampling (cf. Section 4.7) was followed for this research. Different types of participants were selected to answer the research questions (cf. Section 5.2.2). The potential interviewees for both organisations and customers were contacted two months in advance (cf. Section 5.2.2). In order to increase the creditability of the research, examples of emails were retained, as shown in Appendix D. The researcher spent three months in the field collecting data. The participants were sent a consent form that explained the research, its requirements and their rights. The participants and the researcher were required to sign the consent form (cf. Section 5.1.3). An audio recorder was used and notes were taken during most of the interviews and from different sources, such as documents and organisations’ websites. The case study protocol was also defined. Both customer and organisation questions emerged from each other to verify and achieve theoretical saturation. Moreover, the researcher provided a confirmation letter signed by two people, both native Arabic language speakers, to validate that Arabic and English texts have identical meaning. At the end
of each interview, the researcher summarised the issues and sought any further comments from the participants (cf. section 6.1).

8.4.2 Transferability

The procedures that were followed during the research, from identifying the research questions, the selection of the research paradigm, the strategy, data analysis and the findings to the results of the research were within the KSA context. This allowed generalisation to similar contexts. This means that another researcher could apply the same procedures and might obtain similar findings. In addition, the generalisations made are to concepts and theories, not to populations (cf. Section 4.2.3).

8.4.3 Dependability

The research process was clearly explained and justified particularly when selecting the research’s paradigm, strategy and data analysis methodology (cf. sections 4.2.4, 4.4 and 4.6). The researcher used the integration of case study and Grounded Theory as a research strategy. (cf. Section 4.4).

8.4.4 Conformability

Certain steps were followed, which assured that the results of the research were based upon the collected data. Emergent concepts and categories were based on interpretivist meanings to ensure that they represented the informants’ excerpts. Samples of the participants' responses were presented to demonstrate how the concepts were extracted from the excerpts and then how they were grouped under umbrella categories. The concepts were also interrelated in a systematic way by
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conducting a constant comparison of different types of data via continuous swapping between data gathering and data analysis i.e. the data that emerged from data analysis was used as a basis for collecting subsequent data. An example of an interview with a customers of STC, which has been transcribed and translated by the researcher and then analysed by using line-by-line labelling, is provided in Appendix C.

8.5 Summary

Numerous studies show that 70% of CRM projects have failed and a high number are expected to continue to do so. Research indicates that there are many strategic and tactical CSFs for CRM implementation. Research has also identified an effect of culture on CRM implementation. This research investigated the current perceptions and viewpoints of CRM implementation, looking to identify the CSFs for CRM implementation and their interrelationships within the private sector of the KSA with the ultimate aim of developing an integrated model to support effective implementation of CRM projects. In order to attain the research’s aims, an interpretive-qualitative research methodology was adopted and 54 interviews were held with participants ranging from customers, organisations and the regulators for the Telecom and Banking (SAMA) industries, which helped to make sense of and understand the phenomenon in its natural setting. In analysing the data, Grounded Theory procedures were followed to identify CSFs and the relationships among them in a systematic way. Case study research integrated with Grounded Theory was adopted as the research strategy. The results of the analysis satisfy the research objectives by identifying the CSFs and their interrelationships that affect CRM implementation, discovering the relationships among the key development stages and
CSFs of CRM, and identifying the affect of culture on its implementation by applying Institutional Theory. The whole research process has delivered theoretical, practical and methodological contributions as well as proposals for future research.
References


References


International Monetary Fund (2012). World Economic Outlook, April 2012, p. 179.


References


References


References


Appendices

Appendix A: Published Papers Abstracts
IDENTIFYING THE RELATIONSHIPS BETWEEN KEY DEVELOPMENT STAGES AND CRITICAL SUCCESS FACTORS FOR CUSTOMER RELATIONSHIP MANAGEMENT

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Abstract

Customer Relationship Management (CRM) becomes essential solution for organisations looking for increasing, retaining and satisfying their customers. Many organisations change their business process from being product-centric to being customer-centric. By the end of 2012, it is predicted that companies will be spending more than $13 billion on CRM packages. A survey conducted by Gartner (2012) for Chief Executive Officers (CEOs) revealed that CEOs quoted CRM as their most significant area of investment to improve their business over the next five years. However, studies have found that it is only a minority of CRM projects that achieve success. It is argued that one of the reasons for this is the inappropriate assessment of Critical Success Factors (CSFs) during the development life cycle of CRM implementation. In a project, CSFs need to be applied in certain stages during life cycle of the project to achieve the purpose of adopting them. Therefore, the aim of this research is to determine the relationships between the identified CSFs associated with CRM implementation and the key development stages of CRM implementation, which revealed the important of these relationships for the success of the implementation. The research involves fieldwork based on one particular national context; the Kingdom of Saudi Arabia (KSA).

Keywords: Component; CRM, critical success factors, successful CRM implementations, key development stages of CRM project Word Count: 2267

1. Introduction

Customer Relationships Management (CRM) is defined as "A comprehensive strategy and process of acquiring, retaining, and partnering with selective customers to create superior value for the company and the customer. It involves the integration of marketing, sales, customer service, and the supply-chain functions of the organisation to achieve greater efficiencies and effectiveness in delivering customer value" [20]. A successful CRM implementation can help in growing, retaining, satisfying customers of organisations [17].

This Paper is presented at: International Conference on Information Technology, E-Government and applications (ICITEA 2013)
CRITICAL SUCCESS FACTORS FOR CUSTOMER RELATIONSHIP MANAGEMENT IMPLEMENTATIONS

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Recommended Citation

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CRITICAL SUCCESS FACTORS FOR CUSTOMER RELATIONSHIP MANAGEMENT IMPLEMENTATIONS

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Abstract
The growing forces of increasing global competition, contracting customer demands, and the significant revolution in Commercial Off The Shelf (COTS) solutions, especially Customer Relationship Management (CRM) applications, have together put pressure upon many organisations to implement CRM solutions and to switch their organisational processes from being product-centric to being customer-centric. A CRM initiative is not only technology; it is a business strategy supported by technology which automates and enhances the processes associated with managing customer relationships. By the end of 2010, it is predicted that companies will be spending almost $1 billion yearly on CRM solutions. However, studies have found that 70% of CRM projects have failed. Understanding the factors that enable success of CRM is vital. There is very few existing specific research into Critical Success Factors (CSFs) of CRM implementations, and there is no comprehensive view that captures all the aspects for successful CRM implementation and their inter-relationships. Therefore, the aim of this paper is to explore the current literature base of CSFs for CRM implementations and proposes a taxonomy for them. Future research work will continue to investigate in-depth these factors by exploiting the complex system links between CSFs using systems thinking techniques such as causal maps to investigate the complex systemic networks of CSFs in organisations which result in emergent effects which themselves influence the failure or success of a CRM.

Keywords: CRM, Critical success factors, Successful CRM implementations
Customer Relationship Management: Comprehensive View

Ahmed Sanad*, Christine Fidler**, and Neil McBride***

Companies look to gain a competitive advantage over their competitors by adopting Customer Relationship Management (CRM). CRM implementation issues have become more and more important with the huge percentage of failures. This year, organizations are expected to spend about $11 billion on CRM implementation. As a consequence, CRM revenue from vendors will grow to $16.9 billion. Over 69% of enterprises reveal that implementing CRM strategy ranks among the top five corporate objectives. When CRM is mentioned, most people think of technologies that could enhance sales and order management, marketing and field services. However, CRM is more than just technology; it is a combination of strategy, process, and technology. There is no comprehensive view of CRM. Therefore, the aim of this paper is to review the academic literature on customer relationship management (CRM), and provide a comprehensive view of CRM in terms of its definitions, drivers, benefits and functionality categories.

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Appendix B: Ethical Form
APPENDICES

DE MONTFORT UNIVERSITY

APPLICATION FORM TO GAIN APPROVAL FOR ACTIVITIES INVOLVING HUMAN RESEARCH

Notice to Staff and Students

If your research involves using human tissue or fluid samples please DO NOT use this application form. Please approach the Research and Commercial Office, Faculty of Health and Life Sciences, 225L Hawthorn Building, Phone: 7891 / 7777 for the correct application form if you are using human tissue.

The University requires that approval is obtained by members of staff of the University and by students of the University who wish to engage in the type of research detailed below. Please use this form for an application if your research involves:

1. Gathering information from and about individual human beings (and organisations) through:
   - interviewing
   - surveying
   - questionnaires
   - observation of human behaviour
   - modifying/disturbing human behaviour
   - interfering in normal physiological and/or psychological processes

2. Using archived data in which individuals are identifiable.

3. Researching into activities which involves direct observation of or contact with those who are or who might reasonably be supposed to be engaged in or have engaged in criminal activities or activities which are related to criminal activity

4. Research which involves a risk of physical or psychological injury to the researcher or any other person involved in the research

5. Supporting innovation that might impact on human behaviour e.g. Behavioural Studies

[It should be noted that in regard to research into illegal activities there are no exclusions or blanket permissions and the University Insurance cover may not apply if the research activity has not been cleared by the University or, in certain cases with delegated authority, the appropriate Faculty Committee.]

Guidance and support will be given by your supervisor (for student research), your line manager or an appropriate designated officer/ Faculty Research Office. Queries arising out of this should be directed to:

FAILURE TO GAIN FREC APPROVAL FOR YOUR RESEARCH MEANS THAT YOUR PROJECT MAY BE FAILED OR THAT YOU ARE SUBJECT TO DISCIPLINARY ACTION.
DE MONTFORT UNIVERSITY

APPLICATION FORM FOR RESEARCH ACTIVITY REQUIRING HUMAN RESEARCH ETHICS CONSIDERATION OR APPROVAL

Staff/Student Name
Ahmed Abdullah Saud

Programme (if relevant)
Information Society Doctoral Programme (ISDP)

Contact Information (email address, internal post address etc)
Ashana@gmail.com
Mobile 07989100195

Title of Research Project:
Developing an integrated model to support effective Customer Relationship Management (CRM) implementation in the private sector of the Kingdom of Saudi Arabia (KSA)

Brief description of proposed activity and its objectives:
This research aims to develop a model to support effective implementation of Customer Relationship Management (CRM) projects in the private sector of the Kingdom of Saudi Arabia (KSA). This can be achieved by answering the following questions: What are the Critical Success Factors (CSF's) for CRM projects implementation that have been already identified in the developed country and developing country? What are CSF's for CRM implementation in KSA and why are they different (if they are)? What are the key development stages of CRM implementations? How do the CSF's identified in KSA relate to these stages?

Ethical issues identified:
Collecting data e.g. interviewing individuals, and do surveys, i.e. distribute questionnaires by post, electronic mail or official website

How these will be addressed:
Participate must be adults who understand the research, realise that they can withdraw their participation at any time they would like to do and they aware of that the collected data would be appropriately recorded and signed acknowledgement or that.

To which ethical codes of conduct have you referred?
BCS (Code of Conduct & Code of Good Practice)
Appendices

How have concerns regarding the safety of the researcher and/or the research subject been addressed if applicable?

N/A

Checklist for applicant:

Has the research proposal identified any of the following research procedures?

1. Gathering information from or/and about human beings through: Interviewing, Surveying, Questionnaires, Observation of human behaviour
2. Using archived data in which individuals are identifiable
3. Researching into illegal activities, activities at the margins of the law or activities that have a risk of personal injury
4. Supporting innovation that might impact on human behaviour e.g. Behavioural Studies

The following should be considered. Please tick yes as relevant:

- Providing participants with full details of the objectives of the research
- Providing information appropriate for those whose first language is not English
- Voluntary participation with informed consent
- Written description of involvement
- Freedom to withdraw
- Keeping appropriate records
- Signed acknowledgement and understanding by participants
- Relevant codes of conduct/guidelines

Are there other/additional factors that could/will give rise to ethical concerns? E.g. Communication difficulties

Data collection will utilize either English or Arabic depending on participant circumstances.

List of accompanying documentation to support the application:

1. A copy of the research proposal
2. The details of arrangements for participation of human subjects (including recruitment, consent and confidentiality procedures and documentation as appropriate)
3. A copy of all the documentation provided to the volunteer to ensure the clarity of information provided
4. Copies of appropriate other ethical committee permissions (internal or external) or supporting documentation
5. If appropriate: a list of proprietary drugs or commercial drugs to be used in the proposed investigation including formulation, dosage and route of administration and known adverse side effects
6. A statement of your competence to carry out this research as a student or a brief one page curriculum vitae for each applicant, including recent publications (staff only)
7. Other documentation as advised necessary.
There are normally four possible outcomes from reviewing the activity against the procedures in place:

1. no ethical issues
2. minor ethical issues which have been addressed and concerns resolved
3. major ethical issues which have been addressed and concerns resolved
4. ethical issues that have not been resolved/addressed

Provisional approval could be given at the discretion of the Research Ethics Committee.

Authorization is dependent on Faculty. Please refer to your faculty guidelines for details on how outcomes are reached:

- The reviewer advises the PMB/SAH/REC of those activities in the first three outcomes.
- Activities in the fourth outcome are submitted to the Faculty REC for resolution.
- The approved form must be kept with project documents, e.g. be included as an appendix in the report.

Signature of researcher / student: Ahmed Sanad  Date: 16-06-2009
Supporting signature (first supervisor, line manager): Dr. Christine Fihler  Date: 16-06-2009
Authorising signature (Second supervisor, FHREC Chair): Dr Neil McBride  Date: 16-06-2009

☐ Tick here if approval is conditional. State conditions below:

Note to the applicant: If you receive conditional approval, you may proceed with preparing the project, but you must NOT start data collection unless you have met the conditions and received full approval.

☐ Tick when conditions have been met.
Authorising signature:  Date
Dear Participant

This letter is to give you information in the hope that you will participate in a study for a research as part of my PhD study at Information Systems department of faculty of technology at De Montfort University. This study will inform my research on providing an analysis of the various critical success factors involved in the CRM project implementation within the private sector of the Kingdom of Saudi Arabia (KSA).

As a result of your contribution I will:

- Identifying the CSFs in CRM project implementation in the Kingdom of Saudi Arabia (KSA), with the ultimate aim of developing an integrated model to support effective implementation of CRM projects within the private sector of the KSA.
- This research will benefit both academics and practitioners.

Participation in this study is entirely voluntary. It will involve an interview of approximately 30 minutes in length to take place at Riyadh, your head office on as previously arranged.

You may decide not to answer any of the interview questions if you wish. You may also decide to withdraw from this study at any time by advising Mr. Ahmed Sanad. I may ask for clarification of some points some time after the interview, but you will not be obliged in any way to clarify or participate further. Beyond that I will not seek any more interviews or make any further contact with you about this after the interview unless you ask me to.

If you request, the information you provide can considered confidential, except that with your permission anonymised quotes may be used. If you request confidentiality, beyond anonymised quotes, information you provide will be treated only as a source of background research, alongside book and web-based research (and interviews with others).

If you request, your name or any other personal identifying information will not appear in the course project paper resulting from this study; neither will there be anything to identify your place of work or the business.

Notes collected during this study will be retained for 10 years after complete this research period (i.e. 2020/2021) in a secure location and then destroyed. The information gained from this research will only be used for the above objectives, will not be used for any other purpose and will not be recorded in excess of what is required.

Even though I may present the study findings to the Conferences, Journals, and Information Society Doctoral Programme Committees, only my supervisors, Dr. Christine Fidler and Dr. Neil McBride, my thesis examiners and I will have access to the interview data itself (unless there is mention of illegal behaviour in the interviews). There are no known or anticipated risks to you as a participant in this study (unless you mention issues of illegality).

If you have any questions regarding this study or would like additional information please ask me before, during, or after the interview.

I can assure you that this study has been reviewed and approved by my course instructor. Thank you for your assistance in this project.

Yours Sincerely,

(Ahmed Sanad)

1 According to De Montfort University's regulation
I have read the information presented in the information letter about a study being conducted by Mr. Ahmed Sanad for PhD study at Information Systems department of faculty of technology at De Montfort University.

I have had the opportunity to ask any questions related to this study, and received satisfactory answers to my questions, and any additional details I wanted.

I am also aware that excerpts from the interview may be included in the course project paper to come from this research. Quotations will / will not be kept anonymous. I do / do not give permission for my identity to be revealed in research reports.

I was informed that I may withdraw my consent at any time by advising the student researcher. With full knowledge of all foregoing, I agree to participate in this study.

Participant Name: __________________________
Participant Signature: __________________________

Interviewer Name: __________________________
Interviewer Signature: __________________________
Appendices

CRM Research study: participation procedures

Recruitment

This research will focus on identifying the Critical Success Factors (CSFs) in Customer Relationship Management (CRM) projects implementation in the KSA, with the ultimate aim of developing an integrated model to support effective implementation of CRM projects within the private sector of the Kingdom of Saudi Arabia (KSA).

The criteria that will be used for selecting the sample are those organisations which have implemented or are in process of implementing a CRM project; a project manager, director, owner and sponsor had to be available to participate in the interview within different private sectors, such as (Saudi Telecom, Riyadh Bank, Al-Blad Bank and Toyota Company). Moreover, some customer's of those companies will be interviewed and their viewpoint will be considered. To obtain in-depth and relevant information on the research questions, a series of semi-structured interviews will be conducted, affording the informants the opportunity of supplying their opinions, knowledge and experiences of a wide range issues.

Consent

See document: Consent form for Research Study

Confidentiality

All evaluation materials will be anonymised. No personal identification data will be stored. Users will have a reference number that identifies their answers pre- and post-test. The data will be stored on the DAQ shared drive, so that it is backed up.
To whom it may concern:  

16th February

Dear Sir/Madam,

I confirm that Ahmed Abdurrah Samad, is currently studying for a PhD in Information Systems with myself, as his first supervisor, at De Montfort University, Leicester, in the UK. Specifically, Ahmed is investigating Customer Relationship Management (CRM) implementation issues within the private sector of the Kingdom of Saudi Arabia (KSA) (as a case study). The findings from this research will be of immense benefit both to the private sector within KSA and to other countries in their continued pursuit of effective CRM. I am requesting that you would support Ahmed in his research work, and therefore that you would allow him to gain the information he requires from you regarding CRM and its implementation within your organisation.

Please be assured that any information gained from you will be used solely for the specific purposes of this research, and will be treated with the utmost respect, and in accordance with appropriate ethical practices and legislation.

I hope that you will be able to help Ahmed in his research, and I thank you in advance for your cooperation in this matter.

Yours faithfully

[Signature]

Dr. Christine Fidler BSc (Hons), MBCS, CITP
Principal Lecturer & Research Supervisor
Informatics Department
Faculty of Technology
De Montfort University

Centre for Computing and Social Responsibility, Faculty of Technology, The Gateway, Leicester LE1 9BH.
Tel: +44 (0) 116 250 6163 / FAX: +44 (0) 116 207 8159 / email: CCSR@dmu.ac.uk / website: http://www.ccsr.cse.dmu.ac.uk
Saudi Cultural Bureau in London
630 Chiswick High Road
London
YRS 4W
date

This is to confirm that Ahmed Abdullah Sanad is the second year of study as a doctoral student here at the informatics department of faculty of technology at De Montfort University. His research is “Developing an Integrated Model to Support Effective Customer Relationships Management Implementation in the Private Sector of the Kingdom of Saudi Arabia”. He must now complete his empirical research which requires collecting data from a wide range of organisations and individuals within Saudi Arabia. This will take three months to complete. He must undertake this work from 20th March 2010.

Yours faithfully

Dr. Christine Fidler BSc (Hons), MBCS, CITP

Principal Lecturer & Research Supervisor
Informatics Department
Faculty of Technology
De Montfort University
Appendix C: Example of transcribed interviews with customers in English and Arabic version, and extracted codes and concepts.
<table>
<thead>
<tr>
<th>Reference</th>
<th>Questions (English and Arabic Version)</th>
<th>Open codes (Concept)</th>
<th>Phrase /Excerpt (English and Arabic Version)</th>
</tr>
</thead>
</table>
| Cu.STC5.F.Q1 | Have you order any services from the STC?  
هل طلبت أي خدمه من شركة الاتصالات السعودية؟ | N/A (this is supportive question) | Yes, I ordered service called Maoojod plus” - it shows that your mobile is switch-off for the people who are calling you, but you still know who is calling via SMS. نعم خدمة موجود بلس. وتظهر للمتصل أن جوالك مغلق للذين يكلمنك ولكن تستطيع أن تعرف المتصل من خلال استقبال رسالة نصيه. |
| Cu.STC5.F.Q2 | Have you got any services from STC under your name? Why/Why not?  
هل حصلت على أي خدمه من شركة الاتصالات السعودية باسمك؟ امل الإيضاح في حالة الإجابة بنعم أو لا؟ | Data cleansing and Completion Company, Polices and procedures Data Confidentiality | No, the mobile phone is under my husband name, because, it will be difficult to get all the services easily e.g. regardless of your credit history, if you are female customer, you can’t increase the credit limit, unless you have a man as a sponsor. A friend of mine asked her driver to be her sponsor to increase her credit limit. Moreover, there are few physical service and sales offices for females in STC. Moreover, as a female confidentiality of my personal data is very crucial. لا. جوالي باسم زوجي لأنه من الصعب الحصول على جميع الخدمات بسهولة على سبيل المثال زيادة الحد الأدنى للجوال لأب لا بد من كفيل رجل حتى أن إحدى صديقاتي طلبت من سلفها أن يكلفها. إضافة لوجود عدد قليل من مكاتب خدمات العملاء للنساء. واخيرا خصوصية بياناتي مهم جدا. |
| Cu.STC5.F.Q3 | Have you heard about something called "Customer Relationship Management" implemented in STC?  
هل سمعت بشي يدعى نظام إدارة علاقات العملاء مثلا في شركة الاتصالات السعودية؟ | Customer Awareness | "No, at all" لا على الإطلاق |
<table>
<thead>
<tr>
<th>Question &amp; Code</th>
<th>Context</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cu.STC7.F.Q4</td>
<td>Data sharing, Social norms</td>
<td>&quot;Saudi Culture and society encourages females to keep their personal data private and not share it with others.&quot;</td>
</tr>
<tr>
<td>(Cu.STC7.F.Q4)</td>
<td>Data sharing, Trust, Data Privacy</td>
<td>&quot;Limited data has been shared with STC due to lack of trust for company data privacy policy.&quot;</td>
</tr>
<tr>
<td>(Cu.STC7.F.Q5)</td>
<td>Trust, Legality</td>
<td>&quot;Not sure. I heard of many cases of other people whose personal data has been sent to other commercial companies without their permission. Thus, it is very difficult to be confident about sharing your personal data.&quot;</td>
</tr>
<tr>
<td>Cu.STC5.F.Q5</td>
<td>Accessing Female Data by Male</td>
<td>&quot;Not fully confident because, I heard that most of STC staff can access customers’ data easily.&quot;</td>
</tr>
<tr>
<td>Cu.STC5.F.Q7</td>
<td>Customer Awareness</td>
<td>&quot;No, there are no benefits to sharing my data:&quot;</td>
</tr>
<tr>
<td>Cu.STC7.F.Q7</td>
<td>Data cleansing</td>
<td>&quot;No, They send wrong messages because they think I...&quot;</td>
</tr>
<tr>
<td>Appendices</td>
<td></td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
<td></td>
</tr>
<tr>
<td>meet your needs by analysing your attitude? Why/why not?</td>
<td>Customer segmentation</td>
<td></td>
</tr>
<tr>
<td>am male since the mobile is registered under my father name. They target the wrong person like sending me the bill for my father's land line.”</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>برأيك الشخصي هل شركة لاتصالات السعودية قامت بتلبية احتياجاتك عن طريق فهم سلوك تعاملك معها؟</td>
<td></td>
</tr>
<tr>
<td>Cu.STC5.F.Q8</td>
<td>Have you invited by the STC Company to explain future needs and requirements?</td>
<td>Customer Involvement</td>
</tr>
<tr>
<td></td>
<td>هل دعتك الاتصالات السعودية لمعرفة احتياجاتك ومتطلباتك المستقبلية؟</td>
<td>“No, while other operators do consider our participation for the future needs and requirements”</td>
</tr>
<tr>
<td>Cu.STC5.F.Q9</td>
<td>Have you seen or heard any awareness or advertising by STC Company to introduce a new concept called CRM?</td>
<td>Customer Awareness</td>
</tr>
<tr>
<td></td>
<td>هل رأيت أو سمعت أي حملة دعائية من قبل شركة الاتصالات السعودية توضح نظام إدارة علاقات العملاء؟</td>
<td>“There is no awareness for CRM application.</td>
</tr>
<tr>
<td></td>
<td>لا على العكس يرسلون رسائل خاطئة . هم لا على العكس يرسلون رسائل خاطئة . هم لال الجووال مسجل باسم والدي . هم يستهدفون الشخص الخطأ مثل إرسال الفاتورة الخاصة بتلفون المنزل الخاص بوالدي.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Customer Involvement</td>
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<td></td>
<td>Customer Involvement</td>
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</tr>
</tbody>
</table>

Cu.STC5.F.Q8

Cu.STC5.F.Q9

Customer Involvement

“No, while other operators do consider our participation for the future needs and requirements”

Customer Awareness

“There is no awareness for CRM application.”
Appendix D: Samples of email correspondence with the participating companies
Appendices

approval for collect data from Saudi telecom - aasanad@gmail.com - Gmail

Mosaedd S.Ali Arifi <moarifi@stc.com> 2/18/10

to me:

Dear Mr. Alsanad,

We are happy to support your research. I will make sure all needed resources will be available for you during your data collection. If you need further help please let me know.

Good luck.

Regards,
Mosaedd Alarifi
ITPMO Head
Saudi Telecom Company
Mobile: +966503437634
Loc: +96614431597

[asannad@gmail.com] ahmed Mo: من
تاريخ الإرسال: 17 فبراير 2019 م
الموضوع: approval for collect data from Saudi telecom

Dear Eng. Mosaedd Al-Araifi

As we discussed over the phone, kindly find below my plan to collect and analyze the data from Saudi telecom company, I am looking for your approval.

Interview 7-10 people from Saudi Telecom who play a major role in CRM project the interview will be from 45-60 minutes and it will be recorded data will be analysed later based on Grounded theory model. Interview may be redone again within different or same people to make sure the data is accurate.

Documents, Archive data base, minutes of meeting and progress report will be reviewed

https://mail.google.com/mail/u/0/?ui=2&ik=a88c9ce9050&view=cv&fs=1&tf=1&ver=j... 30/01/1434
Ahmed Mo <aasanad@gmail.com>

to: Moaad

Dear Moaad,

Enterprise CRM Project Manager - Saudi Telecom Group

First of all, I would like to express my thanks for giving me the opportunity to have the pilot study with your project.

As I explain over the phone, I am attaching two documents explaining the objectives of the research. The first session will be on Sunday at Novotel Hotel 5:45 PM to 8:00 PM and the second session will be on Tuesday with same time.

The agenda for the interview is:

- 5 minutes: The researcher will explain the purpose of the research project.
- 1 hour for questions.
- 10 minutes summary of the interview.

Best regards,

Ahmed Sanaad
Ph.D. student researcher

2 attachments — Download all attachments

1. Consent form for Research Study.docx
   20K View Download

2. Dear participant[1].doc
   35K View Download

Moaad S.AI Arifi <moaaf@stc.com.sa>

to: me

Dear Ahmed,

I accept to be interviewed for the purpose you mentioned in your email. I will be there on Novotel.

Best Regards,

Moaad AlArifi // IT Project Manager // IT PMO // Tel:+966 1 4411597 // Mob:+966 563437534

STC

From: Ahmed Mo [mailto:aasanad@gmail.com]
Sent: Saturday, April 24, 2010 7:39 PM
To: Moaad S. AI Arifi
Subject: Pilot Study for Enterprise sector of Saudi Telecom Group of CRM Project

The information in this email may contain confidential material and is intended solely for the addressee. If you are not the intended recipient, please delete the email and destroy any copies of it, any disclosure, or copies.
Thank you for your time and opportunity meeting you

ahmed Mo <aasanad@gmail.com>  
to alferdousba

Dear Basin

I would like to express my thank to you and your colleague Abo Baker Al iedorous for your time and help for my study and it was pleasure meeting you.

As I mentioned I would like to extend my request to see some employee in the business side to complete my study.

Best regards,
Ahmed Al-Sanad

alferdousba@airajhibank.com.sa  
FYA From: ahmed Mo [mailto:aasanad@gmail.com] Sent: Tue 6/8/10

ahmed Mo  
Dear Abubakar I would like to express my thanks and highly appreciate if you...

ahmed Mo  
Dear Brother Abubakar kindly, can i get the answer of my questionnair or f...

abubakar@airajhibank.com.sa  
to me, alferdousba

Dear Ahmed

Sorry in Delay to reply, I think it is better to meet together with Mr. Basim A. Al-Ferdous, I will check with Mr. Basim what the available time for him and I will send meeting request to you.

Best regards
Abubakar

From: ahmed Mo [mailto:aasanad@gmail.com]
Sent: Wednesday, June 30, 2010 1:04 PM
To: Abubakar Abdullah
Subject: Fwd: Thank you for your time and opportunity meeting you
Dear Mr. Ahmed,

We are happy to support your research. I will make sure all needed resources will be available for you during your data collection. If you need further help please let me know.

Good luck.

Regards,
Mosaed Al-Arfi
ITSMO Head
Saudi Telecom Company
Mobile: +966500517324
Tel.: +96614531399

Mosaed Al-Arfi

Dear Eng. Mosaed Al-Arfi,

As we discussed over the phone, kindly find below my plan to collect and analyze the data from Saudi Telecom Company. I am looking for your approval.

Interview 7-10 people from Saudi Telecom who play a major role in CRM project. The interview will be from 45-60 minutes and it will be recorded. The data will be analyzed later based on Grounded theory model. Interview may be repeated again within different or same people to make sure the data is accurate.

Documents, archive data, base, minutes of meeting and progress report will be reviewed and collected in order to analyze them. The result of the research will be shared with you later.

Best Regards,
Ahmed Sanad
De Montfort University
Information Systems Department
Faculty of Technology

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Ahmed Sanad

Kindly find below some approved arrangement for my field work with Saudi Telecom and there is also official letter from other company and the remaining in the way to reply.

Best regards,
Ahmed Sanad

https://mail.google.com/mail/u/0/?ui=2&ik=a886cc9050&view=cm&fs=1&tf=1&ver=j... 06/12/2012