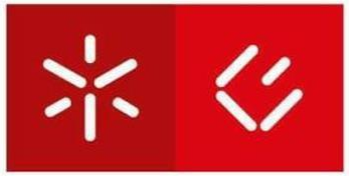


Developing a Plan for Successful CRM Adoption
Readiness: A Case Study of Dimitra International
Noman Ghazi
UMinho | 2026



Universidade do Minho
Escola de Economia e Gestão

Noman Ghazi

Developing a Plan for CRM Deployment and Adoption Readiness: A Case Study of Dimitra International

Master's Internship Report

School of Economics, Management, and Political Science

Work conducted under the supervision of

Professor Doctor Tiago Gomes da Silva Tavares

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Resumo

Este estudo explora os principais fatores de sucesso e os desafios que podem surgir na implementação de um sistema de Gestão de Relacionamento com o Cliente (CRM) na Dimitra International, uma empresa de consultoria com atuação em múltiplas jurisdições. A pesquisa preenche uma lacuna importante na literatura ao concentrar-se na adoção de CRM em pequenas e médias empresas (PMEs) no setor de serviços profissionais, nomeadamente nas áreas financeira, jurídica e de compliance.

O estudo adotou um desenho de métodos mistos convergente para analisar dados qualitativos (seis entrevistas semiestruturadas) e dados quantitativos (um inquérito com 41 colaboradores). A análise revela que a Dimitra International se encontra atualmente em um estado de fragmentação tecnológica, utilizando ferramentas dispersas como Excel, WhatsApp e Outlook. Embora o nível de prontidão motivacional e a perceção dos potenciais benefícios do CRM entre os colaboradores sejam elevados, o estudo identifica obstáculos estruturais significativos. Estes incluem a insuficiência de formação formal, o receio de aumento da carga administrativa e a ausência de uma estratégia centralizada de governança da informação.

O estudo conclui que a implementação eficaz de um sistema de CRM exige a integração da tecnologia com os processos humanos e organizacionais. Também estabelece que a Facilidade de Uso Percebida é o principal fator correlacionado com a intenção de adoção. Como resultado, o estudo sugere um plano de implementação gradual centrado no utilizador. Entre as recomendações estão a introdução de um programa piloto no departamento de Relações com Clientes, formação específica por função e o apoio visível da liderança para garantir não apenas uma adoção simbólica, mas a utilização sustentada do sistema a longo prazo.

Palavras-chave: Gestão de Relacionamento com o Cliente (CRM), Modelo de Aceitação de Tecnologia (TAM), Teoria Unificada de Aceitação e Uso da Tecnologia (UTAUT), Pequenas e Médias Empresas (PMEs), Transformação Digital, Indústria de Consultoria, Estratégia de Implementação, Perceção dos Colaboradores.

Abstract

This study explores the key success factors and challenges that may arise in the implementation of the Customer Relationship Management (CRM) system in Dimitra International, a multi-jurisdiction consultancy company. The research fills an important gap in the literature by concentrating on the adoption of CRM among small-to-medium enterprises (SMEs) in the professional services industry, namely in the financial, legal, and compliance sectors.

The study employed a convergent mixed-methods design to analyze both qualitative data (six semi-structured interviews) and quantitative data (a survey of 41 employees). The analysis shows that Dimitra International is currently in a state of technological fragmentation, as it uses fragmented tools such as Excel, WhatsApp, and Outlook. Although the level of motivational readiness and perception of the potential benefits of CRM among the employees is high, the study finds that there are major structural obstacles. These are the insufficiency of formal training, fear of additional administrative burden, and a centralized information governance strategy.

The study concludes that effective implementation of CRM requires technology in human and organizational processes. It also establishes that Perceived Ease of Use is the best correlate of adoption intention. As a result, this study suggests a user-oriented gradual implementation plan. Some of the recommendations are to introduce a pilot program in the Customer Relations department, role-specific training, and to have visible leadership support in moving the firm to not symbolic adoption of the program, but long-term usage.

Keywords: Customer Relationship Management (CRM), Technology Acceptance Model (TAM), Unified Theory of Acceptance and Use of Technology (UTAUT), Small and Medium-Sized Enterprises (SMEs), Digital Transformation, Consultancy Industry, Implementation Strategy, Employee Perception

Contents

Acknowledgments **3**
Statement of Integrity **4**
Resumo **5**
Abstract **6**
Figures Contents **11**
Tables Contents **11**
1. Introduction **12**
2. Presentation of the Problem **14**
3. Literature Review **15**
3.1. Customer Relationship Management Conceptual Foundations 15
3.1.1. Operational to Strategic CRM Evolution 16
3.1.2. Theoretical Underpinnings 17
3.2. Organizational Reasons to Hinder CRM Adoption 17
3.2.1. Resistance to Organizational Change 18
3.2.2. Process Integration Challenges 19
3.3. Employee Perceptions and Technology Acceptance 19
3.3.1. Technology Acceptance Model 19
3.3.2. Unified Theory of Acceptance and Use of Technology 20
3.3.3. Perceived Usefulness in the Professional Service Setting 21
3.4. Implementation Best Practices 22
3.4.1. Strategic Alignment and Governance 22
3.4.2. Phased Implementation Approaches 22
3.4.3. Infrastructure Training and Support 23
3.4.4. Communication and Change Management 23
3.5. Small and Medium-Sized Enterprise Context 23
3.5.1. Strategic Priorities and Resource Constraints 23
3.5.2. Organizational Characteristics 24
3.5.3. Consultancy Sector Specificities 24
3.6. Measuring CRM Success 25
3.6.1. Operational Metrics 25
3.6.2. Relational Metrics 25

3.6.3. Financial Metrics 25
3.7. Research Gaps and Contribution 26
4. Methodology 27
4.1. Introduction to the Research Methodology 27
4.2. Research Philosophy 27
4.3. Research Approach 27
4.4. Methodological Choice 28
4.5. Research Strategy 28
4.6. Time Horizon 28
4.7. Data Collection Methods 29
4.7.1. Document Analysis 29
4.7.2. Semi-Structured Interviews 29
4.7.3. Survey Questionnaire 32
4.7.4. Managerial Perspectives Supplement 34
4.8. Data Analysis Procedures 34
4.8.1. Qualitative Data Analysis 34
4.8.2. Quantitative Data Analysis 35
4.9. Qualitative and Quantitative Data Integration 35
4.9. Ethical Considerations 36
4.10. Validity and Reliability 36
4.11. Limitations 37
5. Findings and Analysis 37
5.1. Qualitative Findings 37
5.1.1. Findings from the Interview Responses 39
5.2. Quantitative Findings 41
5.2.1. Frequency Distributions 41
5.2.2. Reliability Statistics 41
5.2.3. Independent Samples T-Test 42
5.2.4. Eta Squared of Analysis of Variance 43
5.2.4. Pearson Correlation 49
5.3. Congruent Triangulation of Qualitative and Quantitative Findings 50
6. Discussion 52

6.1. Organizational Obstacles to Adopting CRM: Multidimensional Task 52
6.2. Perceived Ease of Use: The Gap between the Cognitive Readiness and Operational Reality 53
6.3. Social Influence: Leadership Visibility and Peer Endorsement as Adoption Catalysts 54
6.4. Facilitating Conditions and Adoption Intention: Structural Enablement: The Determining Variable 55
6.5. Synthesis: Intersecting Factors and their overall impact on successful CRM Deployment 56
7. Conclusion and Recommendations 56
7.1. Conclusion 56
7.2. Recommendations 58
7.3. Future Research 60
References 62
Appendices 71
Appendix 1: SPSS Outcomes 71
Appendix 2: Interview Responses 78
INTERVIEW 1 Role: Chief Executive Officer 78
Opening Question (Warm-up) 78
Section One: Organizational Barriers to CRM Adoption 79
Section Two: Perceptions of CRM Usefulness and Usability 79
Section Three: Change Preparedness 79
Section Four: Recommendations for Implementation Strategy 80
Closing Question 80
INTERVIEW 2 Role: Sales and Marketing Manager 81
Opening Question (Warm-up) 81
Section One: Organizational Barriers to CRM Adoption 82
Section Two: Perceptions of CRM Usefulness and Usability 82
Section Three: Change Preparedness 82
Section Four: Recommendations for Implementation Strategy 83
Closing Question 83
INTERVIEW 3 Role: Customer Relations Manager 84
Opening Question (Warm-up) 84
Section One: Organizational Barriers to CRM Adoption 85
Section Two: Perceptions of CRM Usefulness and Usability 85
Section Three: Change Preparedness 85

Section Four: Recommendations for Implementation Strategy 86
Closing Question 86
INTERVIEW 4 Role: IT Manager 87
Opening Question (Warm-up) 87
Section One: Organizational Barriers to CRM Adoption 88
Section Two: Perceptions of CRM Usefulness and Usability 88
Section Three: Change Preparedness 88
Section Four: Recommendations for Implementation Strategy 89
Closing Question 89
INTERVIEW 5 Role: Legal and Compliance Manager 90
Opening Question (Warm-up) 90
Section One: Organizational Barriers to CRM Adoption 91
Section Two: Perceptions of CRM Usefulness and Usability 91
Section Three: Change Preparedness 91
Section Four: Recommendations for Implementation Strategy 92
Closing Question 92
INTERVIEW 6 Role: Frontline Employee 93
Opening Question (Warm-up) 93
Section One: Organizational Barriers to CRM Adoption 94
Section Two: Perceptions of CRM Usefulness and Usability 94
Section Three: Change Preparedness 94
Section Four: Recommendations for Implementation Strategy 95
Closing Question 95
Appendix 3: Survey Questionnaire 95
Survey Questionnaire: CRM Adoption at Dimitra International 95
Section One: Demographic and Role Information 96
Section Two: Perceived Usefulness 97
Section Three: Perceived Ease of Use 97
Section Four: Social Influence 98
Section Five: Facilitating Conditions and Adoption Intention 98
Section Six: Open Feedback (Optional) 99

Figures Contents

Figure 1	TAM Model	20
Figure 2	Unified Theory of Acceptance and Use of Technology	21
Figure 3	Interview Guide	32
Figure 4	Coding Tree	39
Figure 5	Department Affiliation	39
Figure 6	Work Experience at Dimitra International	40
Figure 7	Age Range	41
Figure 8	Prior Experience with CRM Systems	42
Figure 9	Crosstab: Age Range and Department Affiliation	47
Figure 10	Crosstab: Age Range and How long have you worked at Dimitra International?	49
Figure 11	Crosstab: Age Range and Prior Experience with CRM Systems	51
Figure 12	Crosstab: Age Range and Primary Work Location	52

Tables Contents

Table 1	Organizational Barriers to CRM Implementation	19
Table 2	Instrument Specifications	32
Table 3	Percentage Frequency	36
Table 4	Department Affiliation	39
Table 5	Work Experience at Dimitra International	40
Table 6	Age Range	41
Table 7	Prior Experience with CRM Systems	42
Table 8	Reliability Statistics	43
Table 9	Group Statistics	43
Table 10	Independent Samples Test	44
Table 11	Crosstab: Age Range and Department Affiliation	45
Table 12	Crosstab: Age Range and How long have you worked at Dimitra International?	47
Table 13	Crosstab: Age Range and Prior Experience with CRM Systems	48
Table 14	Crosstab: Age Range and Primary Work Location	50
Table 15	Correlation	51

List of abbreviations or acronyms

CRM	Customer Relationship Management
DOI	Diffusion of Innovation
EE	Effort Expectancy
FC	Facilitating Conditions
PE	Performance Expectancy
SI	Social Influence
SPSS	Statistical Package for the Social Sciences
TAM	Technology Acceptance Model
UTAUT	Unified Theory of Acceptance and Use of Technology
SME	Small and Medium-Sized Enterprises

1. Introduction

The Customer Relationship Management (CRM) systems have undergone a radical change over the past years, whereby their initial simplified data storage systems have developed into strategic platforms that are integrated and affect the way organizations generate and maintain competitive advantage. CRM systems are used in modern business environments to consolidate customer data, internal processes, and strategic objectives in order to enable organizations to make more accurate and data-driven decisions and enhance overall performance. Through the integration of operational functions and customer insights, organizations can be in a better position to improve service provision, improve customer relationships, and realize long-term growth (Sakyi et al., 2022). This shift is an indication of how digital technologies have become more significant in influencing organizational strategies and customer engagement practices (Amitrano et al., 2021).

The success of CRM systems implementation continues to be unevenly spread in organizations despite their strategic importance. Big businesses usually have access to significant financial assets, a high technological foundation, and expert human resources, which allow them to execute CRM systems in a better manner (Aithal, 2023). Small and medium-sized enterprises (SMEs), on the contrary, often face major difficulties, such as the high cost of implementation, lack of IT knowledge, and organizational resistance to change (Sheth et al., 2023). These obstacles may hinder the implementation process and diminish the chances of realization of desired benefits of CRM systems. Consequently, it is important to learn about the presence of these limitations and find ways to overcome them to achieve successful implementation in the context of SMEs (Dubey & Sangle, 2019).

Dimitra International is an example of a case that is related to the dynamics since it functions in a very competitive and regulated sphere, where it provides consultancy services in the spheres of finance, legal, and compliance. In the case of this organization, the implementation of the CRM system is not only a technological improvement but a strategic initiative that necessitates the alignment in many dimensions, such as technology, organizational processes, and employee behavior (Fernando et al., 2023). The key to successful implementation lies in the capacity of the organization to integrate the system into its current workflows and develop a culture that will support its use. In the absence of this alignment, the organization will be at risk of not using the system effectively and allocating resources inefficiently. On the other hand, a successful implementation may result in a better customer interaction, the ability to make more decisions, and long-term organizational development (Chatterjee et al., 2020).

The fact that CRM systems can offer real-time customer behavior, preferences, and expectations is also a point that reinforces the significance of CRM systems. Such insights help organizations to customize their services in such a way as to satisfy particular customer needs, thus enhancing customer satisfaction and loyalty. Besides, CRM systems facilitate monitoring of key performance indicators (KPIs), which enable organizations to measure the level of internal efficiency as well as external performance results (Hamza et al., 2023). This two-fold functionality underscores the purpose of CRM systems as both an operational and a strategic tool, which justifies its importance in contemporary business settings (Stefanov et al., 2023).

As a result, the deployment of a CRM system should be thoroughly designed, considering both technical needs and organizational preparation as well as strategy.

Founded in 2018, Dimitra International is a company based in several countries in the global market, such as the United States, Germany, Italy, Spain, and Portugal, with its head office in Madrid. The organization has a workforce of about 50 people in various departments such as executive management, sales and marketing, customer relations, information technology, and legal and compliance (Okeke et al., 2024). The company has built a good reputation in offering specialized consultancy services over the years, especially in the areas of business and taxation law. Its capability to cater to various customers in various markets has led to the formation of a strong customer base and a stable market share. Nevertheless, to sustain such a status, one has to keep adjusting to the changes in the market and the rising demands of the customers (Okeke et al., 2024).

The research aims to fill the gap and deliver practical implications that can help to make effective CRM adoption and optimize its benefits (Rahman, 2024). The main research question that drives this research is:

- How can Dimitra International ensure a successful CRM deployment that enhances both client management and internal efficiency?

To address this question, the study will explore the following sub-questions:

- What organizational barriers exist in CRM adoption at Dimitra International?
- How do employees perceive the usefulness and usability of the CRM system?
- Which best practices identified in the literature can be adapted to Dimitra's context?
- What type of deployment plan would best support long-term adoption and effectiveness?

The following dissertation is structured into six distinct chapters, with Chapter 1 presenting an overall overview of the study, followed by the research aim, research questions, and problem statement. Chapter 2 is a literature review that provides a detailed critical review of the existing body of research concerning CRM and its adoption, along with associated theoretical concepts and key challenges. Chapter 3 is on research methodology that provides a detailed overview of the adopted methodological approach to meet the objectives of the study, along with possible limitations. Chapter 4 Data Findings and Analysis includes a detailed qualitative and quantitative analysis of the data as proposed in chapter three, followed by a detailed analysis of the results using a triangulation approach. Chapter 5 is of discussions; the chapter will discuss the qualitative and quantitative outcomes together in light of the provided literature to answer the stated research questions. Chapter 6 is the Conclusion and Recommendations, providing a concrete and concise overview of the entire research, followed by rational and scalable recommendations to Dimitra Internationals in terms of its CRM adoption.

2. Presentation of the Problem

Dimitra International is now within a more competitive and digitally automated market where organizations are using the best technologies and customer-oriented strategies to consolidate their position in the marketplace. Not only are competitors increasing the quality of the services they provide, but they are also employing advanced instruments to connect with clients more efficiently, make the process more personalized, and make the experience of clients even better (Pissarra et al., 2025). The change has exacerbated the level of competition, and Dimitra International has to re-evaluate the current customer engagement strategies and implement more innovative and data-driven ones to stay relevant and competitive.

One of the most crucial problems of the organization is the fact that it has a low level of systematizing the data on customers, analyzing it, and using it to make strategic decisions. With the constantly changing customer expectations due to the rise of more digitalization and demand for personalized services, customer behavior and preferences have been critical in ensuring the maintenance of market share and long-term relationships (Pissarra et al., 2025). In the absence of an integrated system, the organization will face the risk of inefficiency in the management of client information, disjointed communication processes, and the lost potential of creating value. Such constraints can eventually prevent its responsiveness in anticipating the demands of clients and gaining a competitive edge (Chatterjee et al., 2020).

To overcome these challenges, Dimitra International has found the introduction of a Customer Relationship Management (CRM) system to be a strategic measure to improve the ability of the company to manage its customers. An effective CRM system can be effective in centralizing customer information, enhancing interdepartmental communication, and facilitating better decision-making processes. It can also help the organization to provide more personalized and responsive services, hence enhancing customer satisfaction and loyalty (Christodoulou et al., 2025). Nonetheless, introducing such a system does not come without difficulties, especially regarding the organizational preparedness, employee acceptance, and system integration (Wibowo, 2023). Moreover, there are some potential risks that can be caused by the lack of a structured implementation strategy, including low user adoption, resistance to change, and inadequate use of system capabilities. Such problems are also typical of organizations in which technological initiatives are not coordinated with organizational culture and operational mechanisms. As such, technical and human factors should be addressed to the maximum when implementing the CRM system to ensure maximum effectiveness (Stefanov et al., 2023).

The research, thus, responds to the necessity to create a detailed and practical CRM implementation strategy that would be specific to the situation of Dimitra International. The study will seek to establish major challenges, appraise organizational needs, and recommend strategies that promote effective system adoption. In doing this, it aims to help the organization to strengthen its customer engagement practices, operational efficiency, and attain a sustainable competitive advantage in an increasingly dynamic business environment.

3. Literature Review

3.1. Customer Relationship Management Conceptual Foundations.

The scholarly debate on Customer Relationship Management has indeed evolved significantly over the last twenty years, as it has not only broadened its horizons to include strategic, operational, and human aspects but has also upgraded its technological applications (Dwivedi et al., 2021). In the modern world, scholarship appreciates the fact that effective CRM implementation requires the coordinated execution of various organizational factors and not the simple purchase of software applications (Guerola-Navarro et al., 2024).

CRM systems are strategically significant because of their ability to convert fragmented customer information into actionable intelligence that will be used to make decisions across departmental lines (Verhoef et al., 2021). This principle questions the technology-based perspective that has been the major approach to the implementation of CRM over time, where organizations focus on the features of the systems rather than organizational preparedness and strategic alignment (Rainy et al., 2024).

With this as a base, Ramaswamy (2022) came up with a combined model that places CRM at the intersection of people, processes, and technology as they work together in unison to co-create value with the customers. This three-part model has been very effective in helping to re-focus academic and practitioner attention on the organizational and behavioral transformation required to make successful adoption (Corsaro & Maggioni, 2022). According to the framework, the most technologically advanced CRM system will not produce the expected benefits provided that employees are not motivated or capable of using the system effectively or organizational processes are not properly aligned with the capabilities of the system (Mossaei et al., 2025).

Buttle and Maklan (2019) expanded this reasoning by investigating the circumstances in which CRM investments can yield positive returns. They found that the organizations often use CRM technology to spend many resources without the equivalent enhancement of customer relationships or financial performance (Eng et al., 2026). The authors explained this disconnect by the fact that there has been no strategic integration where CRM initiatives are run in isolation from organizational goals and performance measurement systems (Igwe-Nmaju, 2024).

3.1.1. Operational to Strategic CRM Evolution

The historical development of CRM demonstrates the tendency towards the broadening of the research question and its ambitiousness. Initial research focused on the functional aspects of CRM with a focus on how technology might automate the operations of sales forces, streamline operations of customer service teams, and the centralization of customer data archives (Bisht, 2025). Further studies focused on analytical CRM functions and how organizations could derive insights from customer information to make marketing decisions, profile customer groups, and customize services to customers. The authors Amitrano et al. (2021) recorded the way modern CRM systems allow real-time tracking of customer behavior, preferences, and expectations, which provides organizations with the ability to customize their services to address individual customer needs.

Most recently, the strategic CRM paradigm has found its way to scholarship, where systems are platforms of value co-creation and relationship management across long enterprise boundaries. This school of thought acknowledges that CRM skills go beyond organizational boundaries and include partners, suppliers, and even customers themselves (Shinde, 2026). The strategic paradigm is specifically applicable in the case of a consultancy such as Dimitra International, whose value proposition lies in its profound knowledge of the needs of clients and capacity to predetermine the changing needs in the dynamic regulatory context.

3.1.2. Theoretical Underpinnings

The CRM scholarship has been informed by a number of theoretical frameworks, which have offered different insights into the circumstances in which successful implementation could be achieved. According to the resource-based perspective of the firm, the CRM systems are only capable of creating a sustainable competitive advantage when they are integrated with complementary organizational resources such as human capital, proper processes, and favorable culture (El Nemar et al., 2025). This view justifies the fact that the same CRM efforts give different results in different organizations, because the difference in complementary assets intermediates the relationship between technology and performance (Andleeb et al., 2026; Dhrubo, 2025).

3.2. Organizational Reasons to Hinder CRM Adoption

Implementation of CRM systems is faced with resistance at various organizational levels, including employee level and systemic barriers inherent in organizational structures and cultures (Pissarra et al., 2025). These barriers are important in understanding how to come up with effective implementation strategies, especially in small and medium-sized enterprises whose resources are still scarce to implement change management (Khanh et al., 2022).

The article by Khanh et al. (2022) provides an in-depth study that investigates challenges encountered by small and medium-sized businesses in the process of CRM implementation. Moreover, their results have shown that the most visibly manifested obstacle is financial because the CRM systems are associated with significant initial investments in software licenses, hardware infrastructure, and implementation services (Kowsar et al., 2022).

Table 1: *Organizational Barriers to CRM Implementation*

Barrier Category	Specific Obstacles	Potential Consequences
Financial Constraints	Upfront software licensing costs; hardware infrastructure investments; implementation service fees	Resource depletion; inadequate system configuration due to budget cutting; delayed realization of benefits
Limited IT Expertise	Absence of dedicated technical personnel; dependency on external consultants; difficulty evaluating alternative systems	Suboptimal vendor selection; configuration errors; unresolved technical problems; ongoing maintenance challenges
Resistance to Change	Fear of job displacement; discomfort with unfamiliar workflows; perception of surveillance	Low user adoption; abandonment of system in favor of existing practices; negative attitudes toward management
Professional Autonomy Concerns	Perceived loss of discretion; resentment toward standardized processes; devaluation of professional judgment	Active opposition to implementation; deliberate underutilization of system capabilities; turnover among experienced staff
Process Integration Difficulties	Organic process evolution without documentation; misalignment between existing workflows and system logic	Requirement for expensive customization; disruptive process reengineering; fragmented data quality
Data Governance Deficiencies	Absence of data quality standards; unclear ownership of customer information; inadequate validation mechanisms	Inaccurate reporting; eroded trust in system outputs; duplicate or contradictory client records
Confidentiality Requirements	Sensitivity of client information in legal and compliance contexts; regulatory obligations limiting data sharing	Restrictive system configurations; tension between collaboration and privacy; specialized access control needs

Adapted and Revised from Kowsar et al. (2022)

3.2.1. Resistance to Organizational Change

In addition to the technical and financial hurdles of CRM implementation, there exists a significant human aspect of the implementation (Ledro et al., 2023). Resistance to learning new systems can be caused by employees due to fear that they might lose their jobs, or it can be due to basic factors like feeling uncomfortable with new work processes. Nguyen et al. (2012) cautioned that organizations are most likely to overestimate the willingness of their employees to change the well-established work practices and, at the same time, underestimate the power of resistance to change (Ledro et al., 2023).

Aithal (2023) also stressed the need to have early and regular contact with employees during the implementation process. When employees are made to see the sense behind the implementation of CRM, and they get the impression that their interests have been met, then chances are high that they will interact positively with new systems (Uras et al., 2025). On the other hand, an implementation that is done without proper consultation or explanation may also be viewed by the employees as a sign that the management is not taking into consideration their expertise and experience, worsening resistance and undermining the process of adoption (Al-Shuridah & Ndubisi, 2025).

3.2.2. Process Integration Challenges

Organizational processes are usually dynamic and are naturally developed with time, adjusting to local conditions and personal tastes without being documented or standardized (Reineke et al., 2025). This organically developed state of affairs poses

problems to CRM implementation because systems usually need to have regular, standardized processes to work effectively (Sharma et al., 2023). As noted by Finnegan and Currie (2010), organizational readiness assessment before investing in CRM is essential, especially considering the current level of process maturity and organizational ability to redesign the process (Marcinkevage & Kumar, 2025).

The problem of process integration takes various forms. To start with, organizations can find that their current processes are ill-aligned with the logic in CRM systems, and thus have to customize the systems or reengineer their processes. Both ways involve certain costs and risks: customization makes implementation more complex and difficult to upgrade in the future, and process reengineering can destroy working processes and cause resistance among employees (Hamida et al., 2022). Second, organizations might not be able to sustain the quality of data in integrated processes because CRM systems rely on correct, complete, and timely data to create valuable insights (Al-Shuridah & Ndubisi, 2023). Unless data governance is enforced, the value of outputs of well-designed CRM systems will be limited.

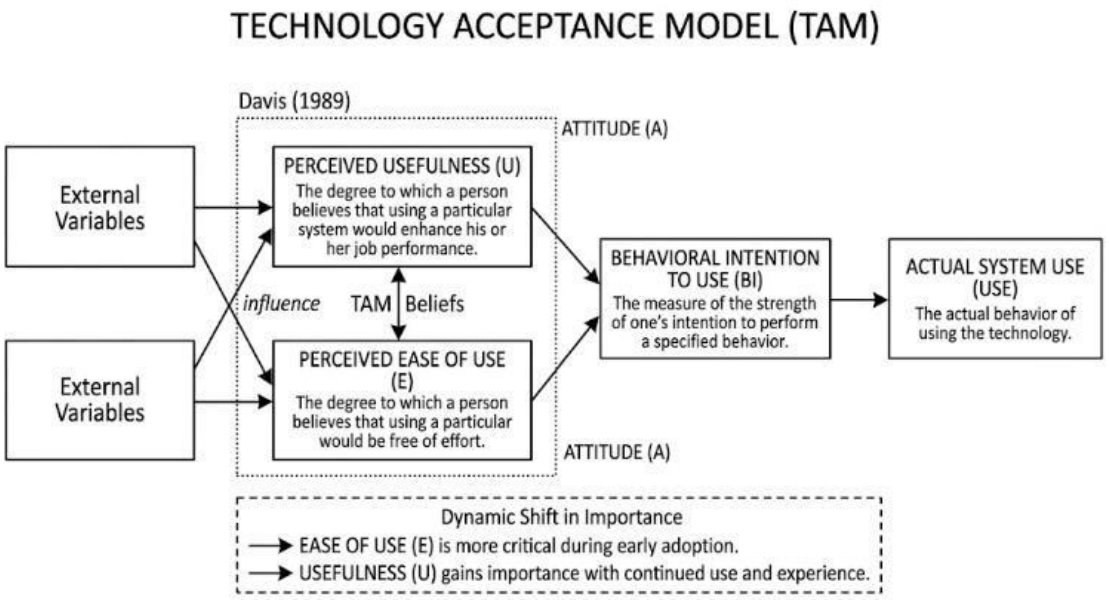
3.3. Employee Perceptions and Technology Acceptance

3.3.1. Technology Acceptance Model

Davis (1989) has come up with the Technology Acceptance Model, which has been one of the most powerful models in the user acceptance of information systems. The model suggests that, two major beliefs influence the intention of an individual to use a technology, namely, perceived usefulness, which is the level at which an individual think that the use of the system will improve his or her job performance, and perceived ease of use, which is the level at which an individual think that the use of the system will not require effort (Stergiou et al., 2023).

The Technology Acceptance Model has been widely tested in various situations and has remained in the research of CRM implementation. In the case of Dimitra International, the model recommends that to achieve the success of adoption, both usefulness and ease of use perception must be taken into consideration. Also, employees have to be convinced that the use of CRM will enhance their service to clients, information management capability, or any other intended goals (Chairany et al., 2025). At the same time, they need to make the system available and easy to understand so that it requires a reasonable amount of time and mental effort to learn and use (Riandhi et al., 2025).

Figure 1: *TAM Model*



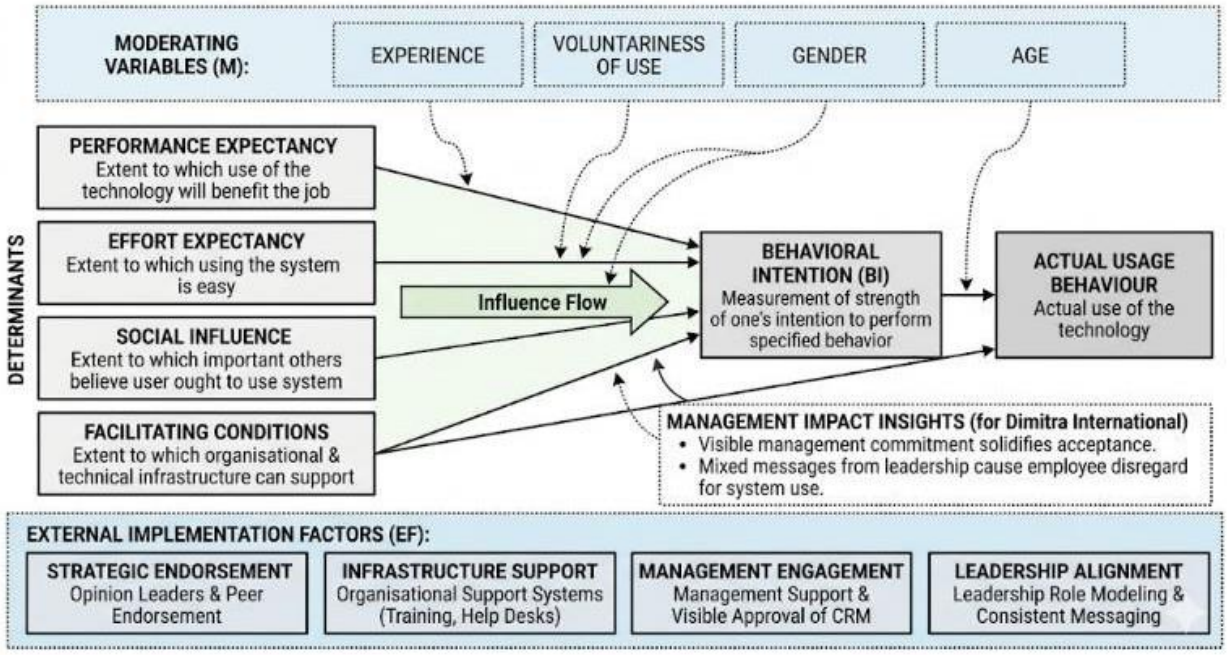
Adapted and Modified from Davies (1989)

3.3.2. Unified Theory of Acceptance and Use of Technology

The Unified Theory of Acceptance and Use of Technology was developed by Venkatesh et al. (2003), who combined components of eight other technology acceptance theories into a unified theory. The unified theory has four fundamental determinants of usage intention and usage behavior, which are: performance expectancy, which is the extent to which the use of the technology will benefit the job; effort expectancy, which is the extent to which using the system is easy; social influence, which is the extent to which the important others believe that the user ought to use the system; and facilitating conditions, which is the extent to which the organizational and technical infrastructure can support (Sangarathas, 2025).

The integrated theory has some benefits for the planning of CRM implementation. First, it explicitly recognizes the influence of social influence, in that colleagues, supervisors, and other reference groups influence individual technology acceptance decisions. The implication of this understanding is that opinion leaders and peer endorsement should be used as an implementation strategy to promote adoption (Strekalova & Bouakkaz, 2022). Second, the theory takes into consideration the facilitating conditions, where the attention is focused on the organizational support systems and the facilitating conditions of the success of using the system, such as training, help desks, and technical infrastructure (Strekalova & Bouakkaz, 2022). Third, the framework allows moderating variables such as experience, voluntariness, and demographic features, which allows making more refined predictions regarding the adoption patterns among various groups of users (Tsou, 2022).

Figure 2: *Unified Theory of Acceptance and Use of Technology*



Adapted and Modified from Strekalova & Bouakkaz (2022)

3.3.3. Perceived Usefulness in the Professional Service Setting

It has been indicated that professionals find CRM useful when the system decreases the mental load of managing client information, allowing them to concentrate on activities that have a higher value of analysis and relationship. The systems that facilitate the process of entering routine data automatically, giving smart reminders about client commitments, or uncovering helpful insights on previous interactions may be seen as helpful (Venkatesh et al., 2003). On the other hand, systems which require a lot of data entry and do not add equal value to the organization can create resentment and opposition, irrespective of how strategic they may be to the organization (Venkatesh et al., 2003).

3.4. Implementation Best Practices

3.4.1. Strategic Alignment and Governance

Before any technology selection or configuration actions, organizations need to state a clear customer strategy that defines the type of relationships that the organization wants to develop, which segments will be prioritized, and what value propositions will be made. Payne and Frow (2013) opined that such a strategic base should be made before technology-related decisions are made because the CRM functions should be chosen in order to facilitate strategic goals and not the other way round. Organizers who reverse this order and choose technology before the strategy definition run the risk of getting systems that do not match their real requirements and, even worse, cut strategic choices yet make them fit to system limits (Dwivedi et al., 2021).

Governance structures also form part of strategic alignment, which helps to clarify decision rights, resource allocation, and accountability of CRM results. Effective implementations usually put in place cross-functional steering committees that are

represented by information technology, marketing, sales, service, and other impacted functions (Al-Kfairy, 2025).

3.4.2. Phased Implementation Approaches

The complexity of CRM implementation is the factor that says that it is not possible to use the so-called big bang techniques that aim to implement the full capabilities of the systems throughout the entire organization at once. Rather, researchers advise incremental implementation plans, which add functionality progressively, to enable the organization to develop capacity, gain experience, and adapt strategies as initial outcomes emerge (Idowu, 2025).

Colladon and Grippa (2025) recommended pilot implementations to particular departments, geographic areas, or customer groups and then proceeded to broader implementations. Pilot implementations can have several purposes: they allow testing the system settings in actual operating environments, create a stream of early success stories that create a momentum for wider usage, and reveal difficulties in implementation that would not have been obvious during the planning phase (Rahman et al., 2025).

3.4.3. Infrastructure Training and Support

Without proper training and continuous support of users, the most well-thought-out CRM system will not work. Training programs should not only cover the mechanics of the system, but should also cover the business processes, data standards, and behavioral expectations that encompass system use. Users must not just know how to do certain things within the system, but why they should be done and what their personal efforts relate to the larger organizational goals (Abaddi, 2025).

In addition to the initial training, organizations have to develop continuous support systems such as help desks, user groups, and advanced training facilities. The users are bound to face questions, issues, and edge cases that are not discussed during the initial training, and their proficiency in overcoming them is a factor that influences their satisfaction and productivity (Ed-Daakouri et al., 2025). Furthermore, the support infrastructure must also have in place the means of escalating unresolved problems and capturing lessons learned in order to enhance future training and system configurations (Kemp et al., 2025).

3.4.4. Communication and Change Management

Effective CRM implementation is an organizational change project, as any project involving technology must systematically attend to the human aspects of change. In their study, Finnegan and Currie (2010) and Pinna et al. (2025) placed organizational readiness as a critical success factor, which involves not just technical preparedness but also the psychological and cultural arena, favoring change. Preparation tests must gauge the employee attitude towards the proposed change, the track record of the organization with past change programs, and the availability of change champions who could be used in championing the change (Pissarra et al., 2025). The communication is to be two-way, and there must be methods of gathering and relying on employee feedback. Resistance is reduced, and engagement is enhanced when employees feel that their concerns were heard and addressed.

3.5. Small and Medium-Sized Enterprise Context

3.5.1. Strategic Priorities and Resource Constraints

First, CRM software and implementation services, along with the required infrastructure, are costlier to invest in initially compared to organizational resources (Hokmabadi et al., 2025). Second, the issue of limited staffing, where employees will have reduced time to train, redesign processes, and other activities involved in implementation, which are carried out alongside normal work (Hokmabadi et al., 2025). Third, small and medium-sized enterprises might not have information technology specialists focused on the organization and might have to rely on external consultants or vendor support to do the system configuration and maintenance (Hokmabadi et al., 2025).

Strategic priorities are also subject to these resource constraints. Khanh et al. (2022) noticed that a small and medium-sized enterprise oriented on the short-term improvement of the operations rather than on the long-term strategic advantages when considering the technology investments. Furthermore, such orientation can be what makes them prefer simpler CRM solutions, targeting immediate, painful areas rather than more comprehensive systems that need a higher investment in their implementation (Hokmabadi et al., 2025). Although this pragmatism is quite comprehensible, it can also curtail the strategic value created through CRM investments (Nethanani et al., 2024).

3.5.2. Organizational Characteristics

SMEs have features of organizations that facilitate and limit the application of CRM. They are usually smaller in size and therefore have fewer organizational levels, have shorter decision-making paths, and leaders and frontline workers are more closely connected (AlQershi et al., 2022). The characteristics can hasten the implementation process because they help to make decisions quickly and communicate change initiatives (AlQershi et al., 2022). The implementation can be done informally without well-defined milestones, responsibilities, as well as performance measurement, which heightens the chances of scope creep, deadlines, and under-achieved benefits (Aprianto et al., 2025). In addition, there are no special project management resources, which implies that the implementation tasks will be taken by the employees already overwhelmed with their daily tasks, which can result in burnout or unrewarded implementation efforts (Aprianto et al., 2025).

3.5.3. Consultancy Sector Specificities

Consultancy organizations such as Dimitra International have unique CRM implementation issues that become problematic due to their professional service type of business. The main assets of consultancies are knowledge, networks, and the experience of their professionals, who are usually highly autonomous in handling client relationships (Mayer et al., 2026). CRM systems that include standardized process or comprehensive documentation requirements can be viewed as a threat to professional autonomy and thus opposed (Panda, 2025).

The research on the implementation of CRM in consultancies is not well developed as compared to the manufacturing, retail, and financial service industries. There has been a dearth of studies on the particular difficulties of professional service firms to deploy CRM systems, so that practitioners have little evidence-based advice. This will be a critical gap considering the increasing role of CRM competencies in professional service competency and the unique aspects of the consultancy operating environment.

3.6. Measuring CRM Success

3.6.1. Operational Metrics

Operational measures determine whether CRM systems have enhanced the effectiveness and efficiency of customer-facing processes. The most common operational metrics are the duration of the sales cycle, the response time of the customer service, the rate of issues being resolved, and the accuracy of the information about the customer (Al-Shuridah, 2025). Such measures are usually stored in the CRM system per se, which allows constant monitoring and continuous improvement (George, 2026).

3.6.2. Relational Metrics

Relational metrics determine the quality of the customer relationship that has been enhanced by the CRM implementation. Relational metrics typically consist of customer satisfaction indices, customer retention indices, retention rates, and share of wallet (Ledro et al., 2023). Also, these measures are indicators of the end goal of CRM systems, which is to allow organizations to develop stronger and more profitable customer relationships (Ledro et al., 2023).

CRM systems can help improve the quality of relationships only when employees apply system capabilities to personalize their interactions, predict customer needs, and address them effectively (Ledro et al., 2023).

3.6.3. Financial Metrics

Financial measures determine the returns of CRM investments after the implementation and operating costs. Typical financial indicators are customer lifetime value, reduction of customer acquisition cost, and CRM investment payback. These measures give the final test of whether CRM investments have generated economic value to the organization (Buttle & Maklan, 2019). Return on CRM investment is difficult to compute due to methodological issues, especially in determining the impact of CRM implementation when compared with other initiatives underway. The researchers also suggested that the control groups or longitudinal designs would help assign the outcomes of CRM investments with a reasonable degree of confidence (Buttle & Maklan, 2019).

3.7. Research Gaps and Contribution

Based on the literature review, a number of gaps are identified that the research is expected to fill. To start with, although much literature has been conducted on CRM implementation in large organizations, there is little focus on the unique issues that small

and medium-sized enterprises face. This is a big gap considering the economic significance of the small and medium-sized enterprises and their increasing investment in CRM capabilities. This study will fill this gap by investigating CRM practice in Dimitra International, a small to medium-sized consultancy firm with operations in more than one jurisdiction.

Second, there has been a lack of focus on the consultancy industry in CRM scholarship in spite of the fact that customer relationships are core to the business model of professional services. Legal, financial, and compliance consultancies have unique implementation issues due to confidentiality requirements, regulatory issues, and professional norms of autonomy. The study is relevant in the context of determining the impact of these industry-specific attributes on CRM implementation plans and performance.

Third, literature constitutes an absence of interwoven frameworks associating technology acceptance theories with implementation best practices in a format that is comprehensible to practitioners. Although theoretical models provide factors that can affect adoption, they do not give a lot of advice on what exactly organizations should do to affect these factors. The proposed research is therefore set to fill this gap by applying the theoretical knowledge to the practical implementation recommendations that would be specific to the situation of Dimitra International.

The research questions that underlie this study are a direct result of the gaps that were found in the literature. The main research question would be how Dimitra International can guarantee effective CRM implementation that would not only improve the management of its clients but also the efficiency of the company internally. The sub-questions analyze the organizational barriers to adoption, the perceptions of usefulness and usability by the employees, the best practices that could be flexible to the context of Dimitra, and the nature of the deployment plan that encourages long-term adoption and effectiveness.

4. Methodology

4.1. Introduction to the Research Methodology

The chapter herein describes the methodological framework that was implemented in the investigation of Customer Relationship Management (CRM) implementation at Dimitra International. The research design is organized in line with the Saunders Research Onion framework (Saunders & Lewis, 2018), which offers a systematic methodological decision-making approach to formulate consistent methodological decisions by making sequential decisions.

4.2. Research Philosophy

The study was pragmatist in philosophy, meaning that it placed more emphasis on practical implications and methodological suitability than on a philosophical obligation to specific philosophical traditions (Kaushik & Walsh, 2019). Implementation research was especially appropriate to pragmatism since the problems that organizations encounter were very complex and multidimensional, and cannot be effectively addressed with just one philosophical perspective. Instead of

making a commitment to either positivist assumptions about objective reality or interpretivist assumptions about socially constructed meaning, pragmatism allowed the researcher a choice of methods according to their suitability in answering particular research questions (Alharahsheh & Pius, 2020). The pragmatist approach can fit both types of phenomena into one research design.

4.3. Research Approach

The study adopted the abductive approach that alternated between data and theory to formulate explanations for observed phenomena (Morgan, 2022). Abduction is contrasted with deduction, which tests existing theories by testing hypotheses, and induction, which forms new theories based on data with no theoretical guidance.

The abductive methodology was consistent with the research goals in a number of ways. Literature review has provided the theoretical frameworks applicable to the work, such as the Technology Acceptance Model (TAM) and the Unified Theory of Acceptance and Use of Technology (UTAUT) that offer preliminary sensitizing concepts to be used in data collection and analysis. Nevertheless, these frameworks were designed in a scenario that is not similar to Dimitra International, and their applicability to a small and medium-sized consultancy cannot be presupposed.

4.4. Methodological Choice

The study was based on the mixed-method research design, which combined qualitative and quantitative data collection and analysis methods in one particular study (Baran, 2022). Mixed-method designs were especially useful in implementation research since they allowed the researcher to grasp the fullness of patterns within the organization as well as the richness of personal experiences and views. The design that was used was a convergent design, where qualitative and quantitative data were gathered simultaneously, analyzed independently, and then combined in the interpretation process to create a holistic impression.

The qualitative aspect of the research aimed at the investigation of the organizational obstacles, the situational variables, and the perceptions of the employees that cannot be easily reflected by the standardized tools. The semi-structured interviews with the managers and the employees provided detailed and rich information about the experiences with the current systems, the expectations of the new CRM, and the concerns about the implementation process. The analysis of documents added to the information from interviews to give evidence related to the formal processes, historical decisions, and contemporary workflows.

4.5. Research Strategy

The study pursued a single case study approach, where its attention was highly concentrated on Dimitra International CRM implementation (Yin, 2018). The case study approach was suitable when the research sought to explore a contemporary

phenomenon in its real-life environment, especially when there was no clear boundary between the phenomenon and its environment. The application of CRM at Dimitra International was one such phenomenon in which the success of the project would have been determined by intricate relationships between technology, organizational processes, employee behavior, and strategic goals.

4.6. Time Horizon

The study followed a cross-sectional time frame, in which the data were gathered at one time instead of monitoring the variation over a long time (Cohen et al., 2017). A cross-sectional design is suitable considering the research objectives, which aim at comprehending the present organizational preparedness, perception, and hindrances of employees before CRM implementation (Cohen et al., 2017). In this baseline assessment, the existing conditions of the organization were used to develop an implementation plan.

The cross-sectional design acknowledged the feasible nature of dissertation research, such as the scarcity of time to collect and analyze the data. The researcher admits, though, that the implementation of CRM was a longitudinal process by definition, and the attitudes and capabilities change with time. The weaknesses of cross-sectional design were managed by retrospective questions in the interview and survey, where the participants were expected to explain how the practices and attitudes have evolved over the years.

4.7. Data Collection Methods

4.7.1. Document Analysis

Document analysis is a preliminary method of data collection where context is given on the processes, systems, and strategic priorities currently used by Dimitra International before primary data collection begins (Morgan, 2022). The documents that were gathered and evaluated were internal process documentation, description of workflow, current client management procedures, information technology infrastructure evaluation, and strategic planning documents regarding customer relationship management. Records of past technology implementation efforts and post-implementation reviews were also investigated, where possible, in order to identify common challenges.

4.7.2. Semi-Structured Interviews

The main qualitative data source was semi-structured interviews, which allowed the researcher to explore the experiences, expectations, and concerns of the workers in detail in terms of CRM implementation (Castleberry & Nolen, 2018). The semi-structured format enabled the interviewer to adhere to common questions for all participants but remain flexible to explore emergent themes and probe answers that need more clarification.

Interview Sampling Plan

The selection of interview participants proceeded based on purposive sampling so that they represent the functional departments, hierarchical levels, and the roles that will be pertinent to the CRM implementation (Campbell et al., 2020). The sampling strategy was focused on people whose position provided them with a specific understanding of the processes of client management, information systems, or change management. The following participants were interviewed:

Executive Management (1 participant): The Chief Executive Officer and the Chief Operating Officer offered executive views of CRM objectives, resource commitments, and success criteria. These interviews shed light on the strategic organizational intentions to implement CRM and the limitations within which implementation should be done.

Department Managers (3 participants): The interview involved Department Managers of four key departments, and they were the Sales and Marketing Manager, Customer Relations Manager, Information Technology Manager, and Legal and Compliance Manager. Both managers carry departmental insights on the existing processes, future challenges, and needs in order to have CRM adoption success. This view of the Legal and Compliance Manager is especially crucial considering the nature of the regulatory environment in which Dimitra International functions.

Frontline Employees (2 participants): The sales, customer relations, legal, and compliance departments were sampled to pick six employees who were involved with clients at the front line. These respondents offered on-the-job insights into the current client management practices, frustrations with the current systems, and their expectations of CRM capabilities.

Total Interview Parties: A total of 06 participants took part in the interview, representing approximately 24% of the Dimitra workforce. This is a large enough sample size to reach thematic saturation and is manageable within the project limitations. This carefully chosen sample provided coverage across all major functional areas pertinent to CRM adoption and was adequate to attain thematic saturation within the scope of the project.

The interview guide was structured in terms of four thematic sections, which were based on the research sub-questions.

- The initial section discusses organizational barriers to CRM adoption, which requires the respondents to explain the barriers they expect or have encountered during the past technology implementation.
- The second part focuses on the perception of CRM usefulness and usability, which provokes the participants to give their opinions about how a CRM system can influence their work and what features can help them or not.
- The third part examines change preparedness, where participants rate their organizations on the organizational culture, leadership support, and their personal desire to embrace new systems.
- The fourth part requests suggestions for implementation strategies that would help to adopt them in the context of Dimitra International.

Figure 3: *Interview Guide*



Created by Author (2026)

In every part, the first question is general and is aimed at getting the participants to express their views in their own words, and the later questions are more specific, probing to get more specifics and examples. The pilot of the guide will be one of the employees who will not be included in the final sample to determine the ambiguous or problematic questions before full implementation.

Interview Procedures

The virtual interviews were conducted via video conferencing software since Dimitra International has a workforce that is geographically spread within the United States, Germany, Italy, Spain, and Portugal. The interviews lasted for about 15-25 minutes. The interviews were audio recorded with the permission of the participants to enable proper transcription. Respondents who did not want to be recorded submitted a written answer to interview questions. Field notes were also made during every interview in order to record non-verbal communication and instant impressions.

4.7.3. Survey Questionnaire

All Dimitra International employees were surveyed on their perceptions of CRM systems and their intentions to use a future system using a survey questionnaire. The survey was sent electronically and took 10 to 15 minutes to fill in.

The following is a sampling plan of the survey.

A stratified sampling method was used to administer the survey to all 50 employees of Dimitra International. The small size of the organization made it possible to employ stratified sampling, which ensured representation of the various employee

viewpoints from different parts of the organization in the quantitative survey findings. The target number of completed responses required for statistical analyses was set at 30 (60% response rate), reflecting the average response rate for internal organizational surveys. In fact, 41 responses were received (84% response rate), which was above the minimum target and allowed the analyses to be performed.

Survey Instrument Development

The survey tool used scales that have been validated by TAM and the UTAUT, modified to suit the CRM context (Venkatesh et al., 2003). The tool consists of the following five sections:

- **Section One:** Demographic and Role Information: This section gathered information about departmental affiliation, time working with the organization, age group, and previous experience in using CRM systems. These variables can be used as possible moderators in further analyses.
- **Section Two:** Perceived Usefulness: There were six items that assessed the extent to which the employees believed a CRM system would improve their job performance. Examples are: "CRM system would make me better able to serve clients effectively" and: A CRM system would help me more effectively accomplish tasks. The responses have been documented on a five-point Likert scale, which ranges from strongly disagree to strongly agree.
- **Section Three:** Perceived Ease of Use: There were six items that assessed perceived ease of using a CRM system. Some examples are "I would find it easy to learn how to use a CRM system" and "I would find it easy to learn how to use a CRM system. The response format of a five-point Likert was retained.
- **Section Four:** Social Influence: Four questions assess perceived expectations of important others towards the use of CRM. Examples would be things like My manager believes I need to use a CRM system and My colleagues would want me to use the CRM system.
- **Section Five:** Facilitating Conditions and Adoption Intention: There were four items that measured the perceived organizational support of CRM use, and four that measured the intention to adopt the system. Examples of adoption intention items are, assuming that I had access to a CRM system, I would use it, and I would use a CRM system in my practice on a regular basis.

The entire tool consisted of 24 items of measurement and demographic questions. The scale reliabilities of prior research were over acceptable limits, with the value of Cronbach's alpha being usually above 0.85 per scale.

Table 2: *Instrument Specifications*

Section	Construct / Focus	No. of Items	Scale Type	Sample Metric / Item
One	Demographics and Role	*Varies*	Categorical	Department, tenure, age, and prior CRM experience
Two	Perceived Usefulness	*6*	5-Point Likert	"CRM system would help me more effectively accomplish tasks."
Three	Perceived Ease of Use	*6*	5-Point Likert	"I would find it easy to learn how to use a CRM system."
Four	Social Influence	*4*	5-Point Likert	"My manager believes I need to use a CRM system."
Five	Facilitating Conditions	*4*	5-Point Likert	Perceived organizational/technical support for CRM
Five (b)	Adoption Intention	*4*	5-Point Likert	"I would use a CRM system in my practice on a regular basis."
Total	**Instrument Total**	24	—	**Expected Reliability (Cronbach's alpha): > 0.80**

Created by the Author

Survey Administration

The survey was sent through an electronic version of a commercial survey platform. The first email invitation had an accessible link to the survey, a sheet of information about the purpose of the research, and a consent statement. The survey had been completed, which meant informed consent. Two follow-up emails were sent at intervals of one week to non-respondents. The survey answers are anonymous, and no Internet Protocol address or other identifying data are collected.

4.7.4. Managerial Perspectives Supplement

Five managers in Dimitra International were given a supplementary structured questionnaire on implementation planning to cover all the strategic and operational perspectives. These managers were the four department managers who were interviewed and the Chief Financial Officer, who gave insights on budget limitations and allocation of resources.

The managerial supplement covered issues such as the timeframes of the preferred implementation, availability of resources to support and train the employees, integration needs with the current systems, and the success metrics to measure the CRM results. The analysis of the responses was done descriptively to support the deployment plan formulated in the course of the research.

4.8. Data Analysis Procedures

4.8.1. Qualitative Data Analysis

Audio records of interviews were transcribed word-for-word, and the transcripts were fed into a qualitative data analysis program to be coded and analyzed. The thematic analysis in accordance with the six-phase procedure outlined by Braun and Clarke (2022) is utilized.

- Phase 1 entailed familiarization with the data by reading the transcripts repeatedly as one listens to the audio recordings.
- Phase 2 created preliminary codes that represent interesting characteristics of the data that can answer the research questions.
- Phase 3 identified themes, and related codes are combined as candidate themes.
- Phase 4 compared themes with coded extracts and the entire dataset to enable consistency and uniqueness.
- Phase 5 established and refined themes, describing the scope and content of each.
- Phase 6 was the final analysis, where the extracts were chosen vividly, and the analysis was connected to research questions and literature.

The coding exercise was a mixture of deductive and inductive. An initial coding schema based on the literature review offers initial codes related to organizational barriers, technology acceptance constructs, and implementation best practices. Inductive codes were formed after the data, when participants raised issues that were not expected in the literature. The coding framework was developed in a refined manner as the analysis continued.

4.8.2. Quantitative Data Analysis

The survey data were examined by descriptive and inferential statistics with the help of statistical programs. Descriptive statistics such as means, standard deviations, frequencies, and percentages were used to summarize the responses in the sample and in demographic subgroups. Scale reliability was evaluated through the use of Cronbach's alpha to ensure that the items in each scale were invariably measuring the structure behind it. Alpha values of 0.70 and above are considered acceptable.

Inferential statistics was used to test the relationship between variables and the differences between groups. Pearson correlation coefficients were used to evaluate the relationship between the perceived usefulness, perceived ease of use, social influence, facilitating conditions, and the adoption intention. T-tests of independent samples and analysis of variance were used to compare the adoption intentions of demographic groups based on department, tenure, age, and previous CRM experience. With such a small sample size, both the effect sizes (Cohen's d of t tests, eta squared of analysis of variance) and the significance tests were presented to give the information about the size of observed differences. The statistical significance level has been established at $p < 0.05$.

4.9. Qualitative and Quantitative Data Integration

Integration was gained in the interpretation step using a weaving technique where both qualitative and quantitative results were presented in a systematic manner by theme (Fetters, Curry, and Creswell, 2013). Under each of the key themes identified

based on the research questions, the analysis provided quantitative patterns and then a qualitative understanding of these patterns that explain, elaborate, or contextualize the patterns. At the point of convergence between qualitative and quantitative results, there was increased confidence in the results. Where the results differ, the discussion examined reasons as to why differences might occur, and this could be due to measurement error, social desirability bias in survey responses, or individual experience of certain respondents.

To ease the process of integration, a joint display matrix was created that had the rows representing the research themes and columns displaying the findings in qualitative and quantitative research as well as integrated interpretations. This graphical representation aided in systematic comparison between data sources and also in finding places where integration led to new information not found by either source separately.

4.9. Ethical Considerations

The study complied with the set principles of conducting research with human subjects, such as informed consent, confidentiality, anonymity, and the right to withdraw without repercussions (Alhabsi, 2024). Ethical consent has been granted by the appropriate institutional review board before data is collected. Authority to carry out research at Dimitra International was recorded by signing a formal agreement that outlines the data access, usage, and storage.

The protection of confidentiality was achieved in a number of ways. The identification information of the participants involved in the interview is deleted before the analysis, and the participants are given pseudonyms. The responses of the surveys were anonymous, and these were not correlated to individual identities. Information was stored in encrypted devices that can only be accessed by the researcher. Avoid reporting an individual wherever possible, particularly since the organization is small, to avoid people being identified.

4.10. Validity and Reliability

There are a number of approaches to qualitative validity (Yin, 2018). The cross-validation of results was made possible by the triangulation of data sources such as documents, interviews, and surveys. Member checking suggested that the interview participants check the summaries of what they contributed to the interview to ensure that they understood properly. Peer debriefing refers to the discussion of newly emerging findings with colleagues who are not part of the research in order to question assumptions and other alternative explanations.

The question of quantitative validity was dealt with by validated measurement scales with known psychometric characteristics. Systematic development of instruments with theoretical guidelines will guarantee content validity. Construct validity was determined by analyzing inter-scale correlations, and relationships that were theoretically predicted were supposed to be found. Internal consistency measures such as Cronbach's alpha are used to determine reliability.

4.11. Limitations

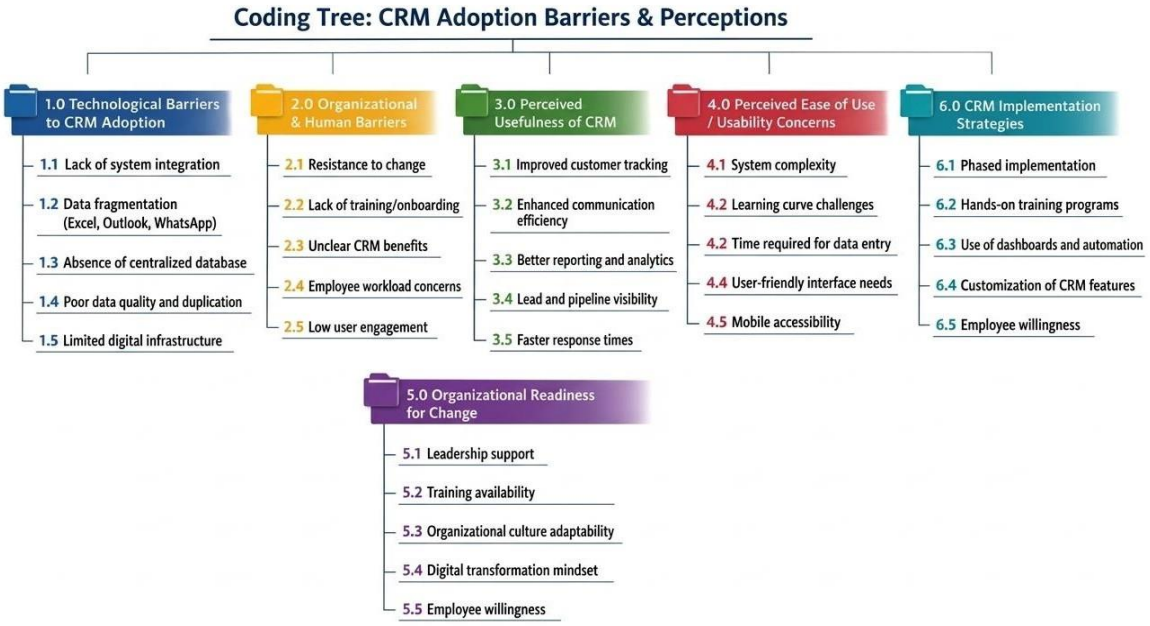
A number of weaknesses of the methodology have been recognized. The single case design restricted the generalizability outside of Dimitra International, but it may be transferable to other similar organizational settings. The cross-sectional design only captured the perceptions at one point in time, which might not be a statement of the stable attitudes or subject to temporary organizational conditions. The small size of the sample, which was used in the quantitative analysis, restricted the statistical power and prevented multivariate modeling. Self-report measures can be prone to social desirability bias, especially when it comes to plans of adopting systems that the management appreciates. Notwithstanding these shortcomings, the research questions were properly aligned with the methodology and aided in generating valuable findings for the planning of CRM implementation.

5. Findings and Analysis

5.1. Qualitative Findings

Based on the 6 interview responses, a detailed coding tree, and a percentage occurrence frequency table below, presents a more comprehensive picture leading to the creation of the themes directly adhering to the main research question.

Figure 4: *Coding Tree*



(Created by Author)

The percentage occurrence for the recurring codes in the interview transcriptions (Appendix 2) is provided in the table below.

Table 3: *Percentage Frequency*

Root Code	Frequency from 6 Interviews	Percent (%)
Technological Barriers	6	100%
Organizational and Human Barriers	6	100%
Perceived Usefulness of CRM	6	100%
Usability Concerns	5	83%
Organizational Readiness	5	83%
Implementation Strategies	6	100%

Created by Author

Objective 1: Barriers to CRM Adoption in the Organization

Theme 1: Multidimensional Barriers constrain the effectiveness of CRM Adoption

The results indicate that CRM implementation at Dimitra International is limited by technological (hacked systems, lack of integration) and human (resistance to change, awareness) factors. Workers are dependent on disintegrated applications like Excel, Outlook, and WhatsApp, which establish inefficiency and duplication. Moreover, a lack of training and communication of the benefits of CRM decreases the involvement of the employees and makes it hard to adopt it.

Goal 2: Attitudes towards CRM Usefulness and Usability

Theme 2: CRM is Perceived to have Performance Benefits, but is Usability challenged

Respondents generally agreed that CRM systems have the potential to enhance customer management, lead tracking, and decision-making substantially. But issues were raised about the complexity of the system, time-consuming data entry, and learning curves. Although usefulness is perceived to be a strong aspect, usability concerns can be a major obstacle to complete acceptance.

Goal 3: CRM Implementation Readiness in the Organization

Theme 3: Preparedness is Contingent upon Leadership Support and Practical Enablement

The company is characterized by moderate to high CRM adoption readiness, which is influenced by a performance-based and flexible culture. Nonetheless, the leadership commitment, systematic training, and involvement of employees are critical in the successful implementation. In the absence of them, an intention to use the system might not lead to its actual use.

Goal 4: Strategies of Effective CRM Implementation

Theme 4: Phased, User-Centric Implementation Drives CRM Success

The identified strategies that work best are phased rollouts, hands-on training, system customization, and automation features. Employees underlined the significance of easy interfaces, accessibility via mobile devices, and providing constant support. It is essential not to use too sophisticated systems so that they will be adopted in the long run.

5.1.1. Findings from the Interview Responses

The qualitative results provide a coherent but critically skewed perception of CRM implementation within Dimitra International, which is informed by technological disunity, resistance within the organization, and pre-requisite preparedness to change. In all six interviews, there is a distinct trend of employees depending on systems that are not connected to one another, which strengthens inefficiencies and silos of information. As an example, the Chief Executive Officer (Interview 1) states that client information is handled by a mixture of Microsoft Outlook, spreadsheets, and SharePoint documentation systems, which indicates a failure to integrate at a strategic level. Equally, the Customer Relations Manager (Interview 3) also shares that client information is managed by using email correspondence, WhatsApp, and internal records, which have to be maintained manually, which,

again, indicates that there are disjointed communication channels among operational functions.

Moreover, technological and human barriers have a tight connection. The Sales & Marketing Manager (Interview 2) points out that inadequate onboarding is structured, and a sense that systems are an added burden instead of productivity-enhancing tools is a major contributor to lower engagement. This is further supported by the Frontline Employee (Interview 6), who cites the lack of proper training and support during system implementation, which means that the resistance to adoption is not just behavioral but is a result of the absence of a proper organizational support system. In turn, these results indicate that the institutionalization of resistance is based on the bad implementation history, not on the reluctance of individual employees.

Nevertheless, although these obstacles exist, the attitudes towards CRM helpfulness are consistently favorable among all the respondents, meaning that they are well aware of its potential usefulness. According to the Chief Executive Officer (Interview 1), "a CRM would offer a centralized client data management platform and contribute to strategic decisions based on the data." Similarly, the IT Manager (Interview 4) also points to such benefits as centralized data storage, streamlining of workflows, and the Legal and Compliance Manager (Interview 5) points to compliance benefits such as automated audit trails and centralized documentation. Taken together, these observations illustrate that usefulness is not a stand-alone concept that can motivate adoption without dealing with usability and integration issues.

Besides, preparedness towards the implementation of CRM seems very conditional. The Chief Executive Officer (Interview 1) and the IT Manager (Interview 4) emphasize the necessity of leadership support, training, and resource allocation, and the Customer Relations Manager (Interview 3) and Frontline Employee (Interview 6) stress the necessity of easy-to-use systems that are supported by sufficient training and guidance. This means that organizational readiness is weak and relies on the quality of execution, communication, and system design.

Lastly, the implementation strategy is well converged in all the roles. The Sales & Marketing Manager (Interview 2) suggests a more user-friendly, staged implementation strategy, whereas the IT Manager (Interview 4) emphasizes system integration, data governance, and data security compliance. Likewise, the Legal and Compliance Manager (Interview 5) believes that compliance should be integrated with the help of role-based access controls and automated compliance checks, and the Frontline Employee (Interview 6) wants to see it being taught step-by-step and supported. On the whole, the evidence indicates that the successful adoption of CRM at Dimitra International will be reliant on the balancing of technological integration and human-centered change management, usability, and cross-functional alignment.

5.2. Quantitative Findings

As the study has been based on mixed-method research, the quantitative part involved a total of 41 responses from the staff working at Dimitra International. The gathered data have been processed using SPSS for descriptive statistics, reliability test, and linear correlation to understand the effects of the constructs of TAM and UTAUT on Successful CRM Deployment.

5.2.1. Frequency Distributions

Table 4: *Department Affiliation*

Department Affiliation					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Executive Management	12	29.3	29.3	29.3
	Sales and Marketing	9	22.0	22.0	51.2
	Customer Relations	11	26.8	26.8	78.0
	Information Technology	6	14.6	14.6	92.7
	Legal and Compliance	3	7.3	7.3	100.0
	Total	41	100.0	100.0	

The table shows that 29.3% of the participants were from executive management, followed by 26.8% from the customer relations department. Moreover, 22% of the employees were from the sales and marketing team, 14.6% from the information technology department, and 7.3% of the employees were from the legal and compliance department. This indicates that the majority of the participants were from the senior management of Dimitra International.

Figure 5: *Department Affiliation*

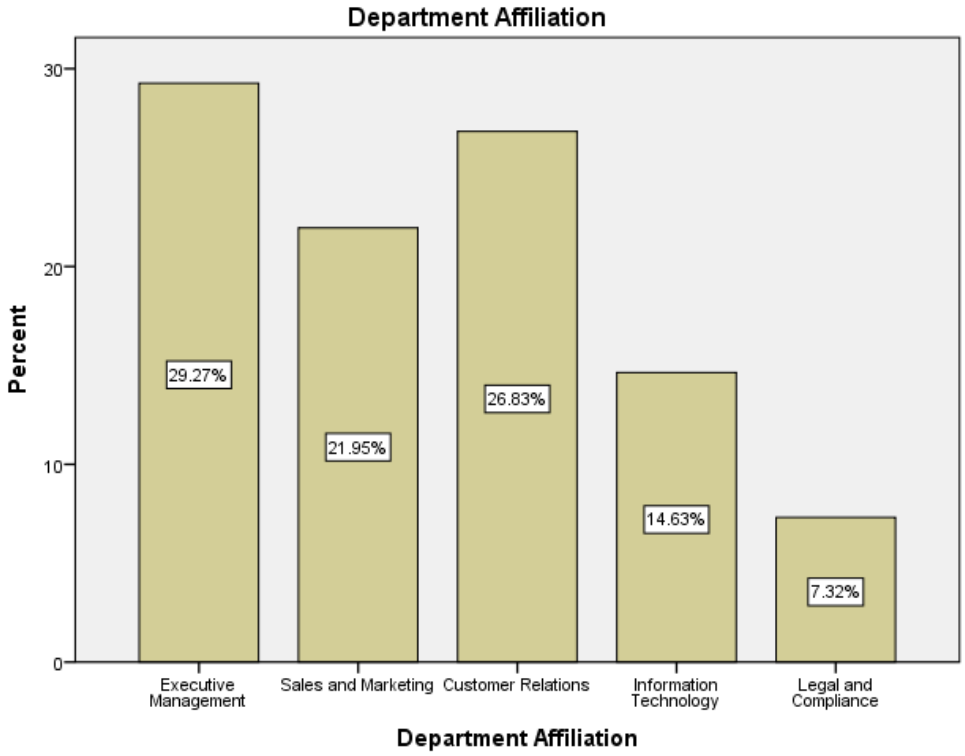


Table 5: *Work Experience at Dimitra International*

How long have you worked at Dimitra International?					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Less than 1 year	8	19.5	19.5	19.5
	1-3 years	14	34.1	34.1	53.7
	4-6 years	9	22.0	22.0	75.6
	7-10 years	7	17.1	17.1	92.7
	More than 10 years	3	7.3	7.3	100.0
	Total	41	100.0	100.0	

The majority of employees had been with Dimitra International for 1-3 years (34.1%), 4-6 years (22.0%), and less than 1 year (19.5%). The smallest groups had worked between 7-10 years (17.1%) and more than 10 years (7.3%), identifying a middle range of workforce experience.

Figure 6: *Work Experience at Dimitra International*

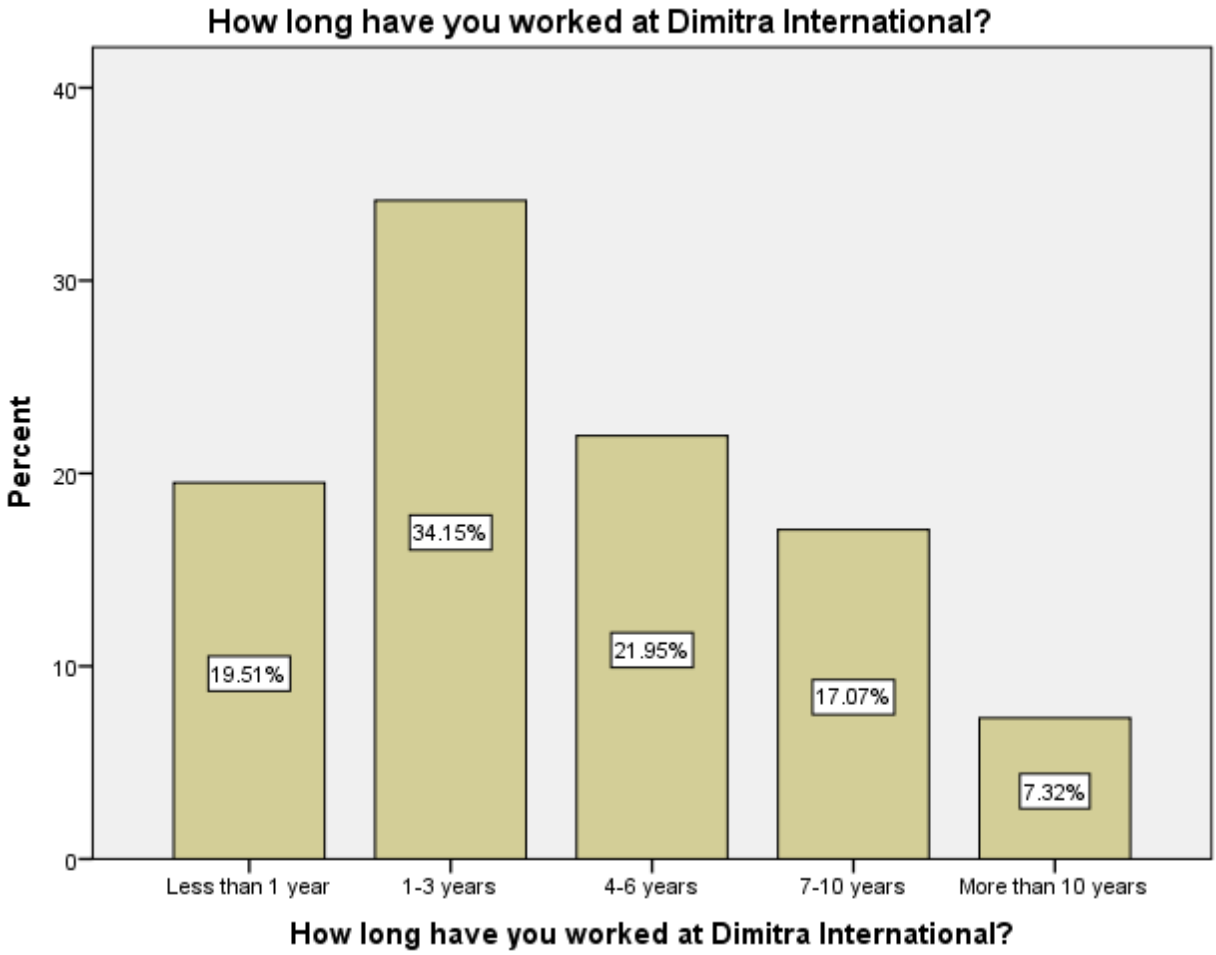


Table 6: *Age Range*

Age Range					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	18-25 years	4	9.8	9.8	9.8
	26-35 years	14	34.1	34.1	43.9
	36-45 years	12	29.3	29.3	73.2
	46-55 years	8	19.5	19.5	92.7
	56 years or older	3	7.3	7.3	100.0
	Total	41	100.0	100.0	

The table above shows that 34.1% of the employees were in the age group of 26-35 years, followed by 29.3% in the age group of 36-45 years. Moreover, 19.5% of the employees were in the age group of 46-55 years. However, small percentages were observed in age groups 56 years or older (7.3%) and 18-25 years (9.8%). The distribution reveals a mid-career workforce.

Figure 7: *Age Range*

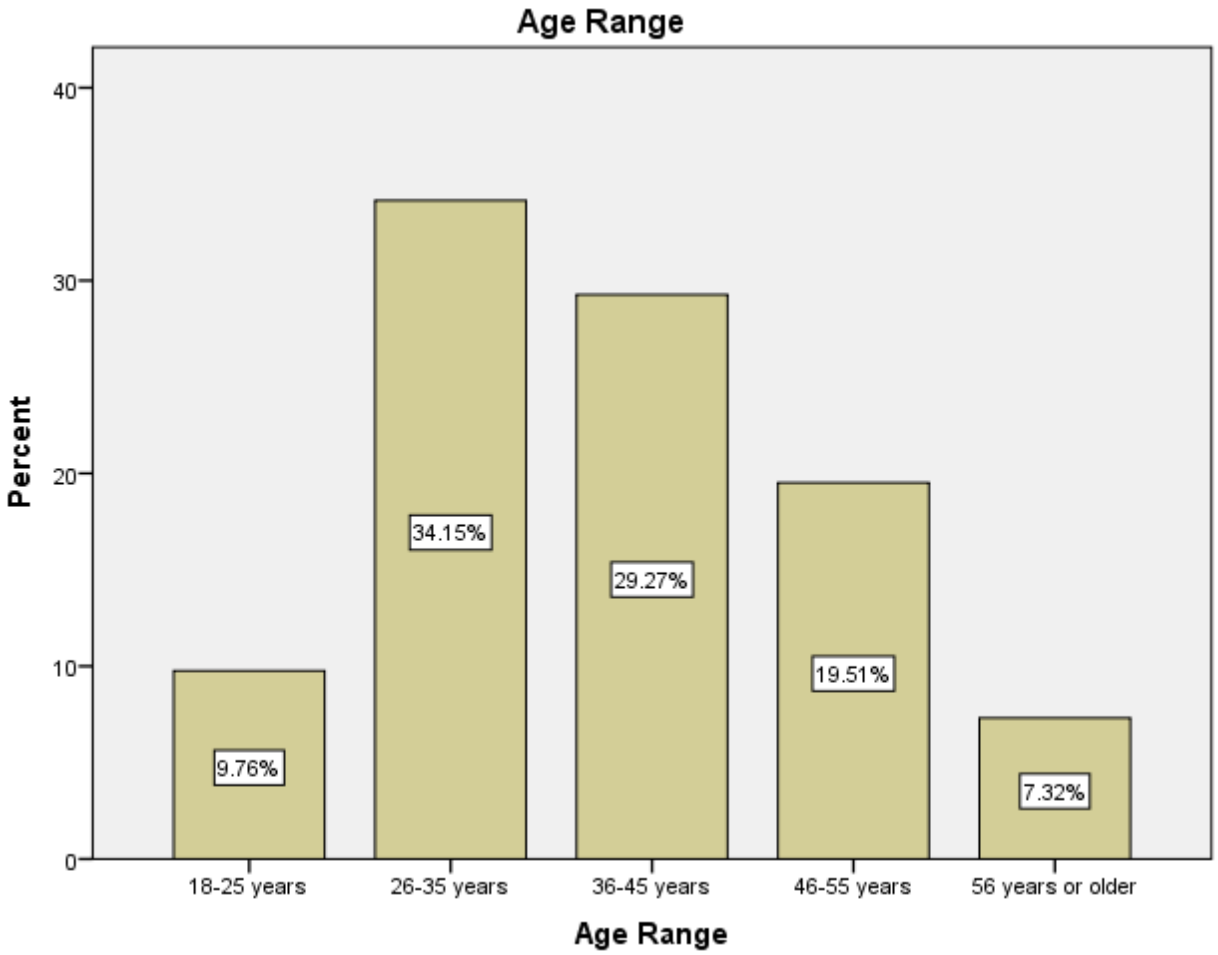
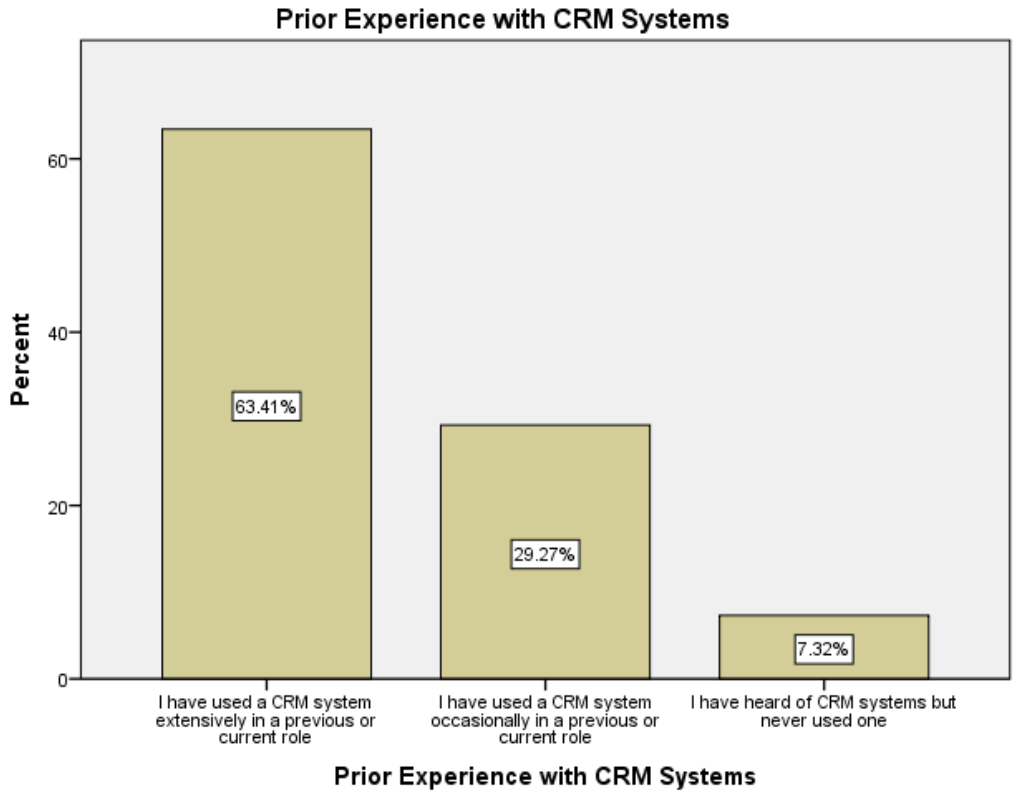


Table 7: *Prior Experience with CRM Systems*

Prior Experience with CRM Systems					
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	I have used a CRM system extensively in a previous or current role	26	63.4	63.4	63.4
	I have used a CRM system occasionally in a previous or current role	12	29.3	29.3	92.7
	I have heard of CRM systems, but never used one	3	7.3	7.3	100.0
	Total	41	100.0	100.0	

Most respondents had significant prior experience with CRM systems (63.4%) or have used CRM systems in their past or present jobs (29.3%). A minority (7.3%) were familiar with CRM systems but had no experience. This highlights a workforce with high levels of exposure, familiarity, and experience with CRM systems, which supports the adoption of CRM.

Figure 8: *Prior Experience with CRM Systems*



*5.2.2. **Reliability Statistics***

Table 8: *Reliability Statistics*

Reliability Statistics

Cronbach's Alpha	N of Items
.807	9

Cronbach's Alpha (0.807) shows that there is good internal consistency with the 9 measured items. This implies that the reliability of the questionnaire is high and there is good correlation between the constructs in the study to generate consistent and stable results.

*5.2.3. **Independent Samples T-Test***

Table 9: *Group Statistics*

Group Statistics

	CRM Adoption and Readiness	N	Mean	Std. Deviation	Std. Error Mean
Department Affiliation	>= 4.0	39	2.513	1.2747	.2041
	< 4.0	2	2.000	1.4142	1.0000
How long have you worked at Dimitra International?	>= 4.0	39	2.564	1.2095	.1937
	< 4.0	2	3.000	1.4142	1.0000
Age Range	>= 4.0	39	2.769	1.0628	.1702
	< 4.0	2	3.500	2.1213	1.5000
Prior Experience with CRM Systems	>= 4.0	39	1.436	.6405	.1026
	< 4.0	2	1.500	.7071	.5000

Table 10: *Independent Samples Test*

Independent Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	95% Confidence Interval of the Difference	
									Lower	Upper
Department Affiliation	Equal variances assumed	.039	.844	1.553	41	.032	.5128	.9269	-1.3620	2.3876
	Equal variances not assumed.			.502	1.085	.698	.5128	1.0206	-10.2844	11.3100
How long have you worked at Dimitra International ?	Equal variances assumed	.002	.969	-.495	41	.034	-.4359	.8810	-2.2179	1.3461
	Equal variances not assumed.			-.428	1.076	.739	-.4359	1.0186	-11.3974	10.5256
Age Range	Equal variances assumed	2.222	.144	1.914	41	.036	.7308	.7995	-2.3479	.8863
	Equal variances not assumed.			-.484	1.026	.711	.7308	1.5096	-18.8048	17.3432
Prior Experience with CRM Systems	Equal variances assumed	.075	.785	1.138	41	.031	.0641	.4657	-1.0060	.8778
	Equal variances not assumed.			-.126	1.086	.919	.0641	.5104	-5.4546	5.3264

An independent samples t-test was performed to test the difference between CRM Adoption Readiness across the four

demographic variables. CRM Adoption Readiness scores were used to group respondents into a high readiness group (score of 4.0 or above, n = 39) and a low readiness group (score below 4.0, n = 2).

The results indicated no statistically significant differences across any of the four demographic variables: Department Affiliation ($t(39) = .553$, $p = .583$), Tenure ($t(39) = -.495$, $p = .624$), Age Range ($t(39) = -.914$, $p = .366$), and Prior CRM Experience ($t(39) = -.138$, $p = .891$). Levene's Test indicated equal variances between groups (all $p > .05$), and equal variances were assumed results were reported.

These lack of statistical significance findings are, in fact, a significant result for the study. The vast majority of respondents (95.1%, n = 39) scored 4.0 or higher on the CRM Adoption Readiness scale, resulting in a highly non-normal distribution of groups that reduces the statistical power of the t-test. The low readiness group's size (n = 2) would mean no demographic variable could yield a significant difference, no matter the effect size. This "ceiling effect" is indicative of a substantive finding: adoption readiness is highly similar among departments, years of service, age, and previous computer experience at Dimitra International. Consequently, strategies to support adoption should not be tailored to demographic groups but rather be general.

This finding is also supported by the descriptive statistics, where CRM Adoption Readiness had a high mean ($M = 4.512$, $SD = 0.675$) with a curtailed range, and the correlation analysis, which shows Perceived Ease of Use and Facilitating Conditions are the chief factors driving adoption readiness - neither of which is demographic in nature. Overall, the t-test results support the inference that, at Dimitra International, CRM adoption readiness is more likely to be determined by perceptual and organizational factors rather than individual demographic characteristics.

5.2.4. Eta Squared of Analysis of Variance

Table 11: *Crosstab: Age Range and Department Affiliation*

		Department Affiliation					Total
		Executive Management	**Sales and Marketing**	**Customer Relations**	**Information Technology**	**Legal and Compliance**	
Age Range	**18-25 years**	0	1	2	1	0	4
	26-35 years	2	5	6	1	0	14
	36-45 years	7	2	0	2	1	12
	46-55 years	2	1	1	2	2	8
	56 years or older	1	0	2	0	0	3

Total		12	9	11	6	3	41

Directional Measures

			Value
Nominal by Interval	**Eta**	Age Range Dependent	.468
		Department Affiliation Dependent	.436

The values of ETA demonstrate a moderate relationship between Age Range and Department Affiliation (eta = 0.468), and Department as dependent (eta = 0.436). This shows a moderate correlation, implying that to some extent age affects departmental distribution. Consequently, the relationship is substantial enough to suggest a strongly dependent relationship between variables.

Figure 9: *Crosstab: Age Range and Department Affiliation*

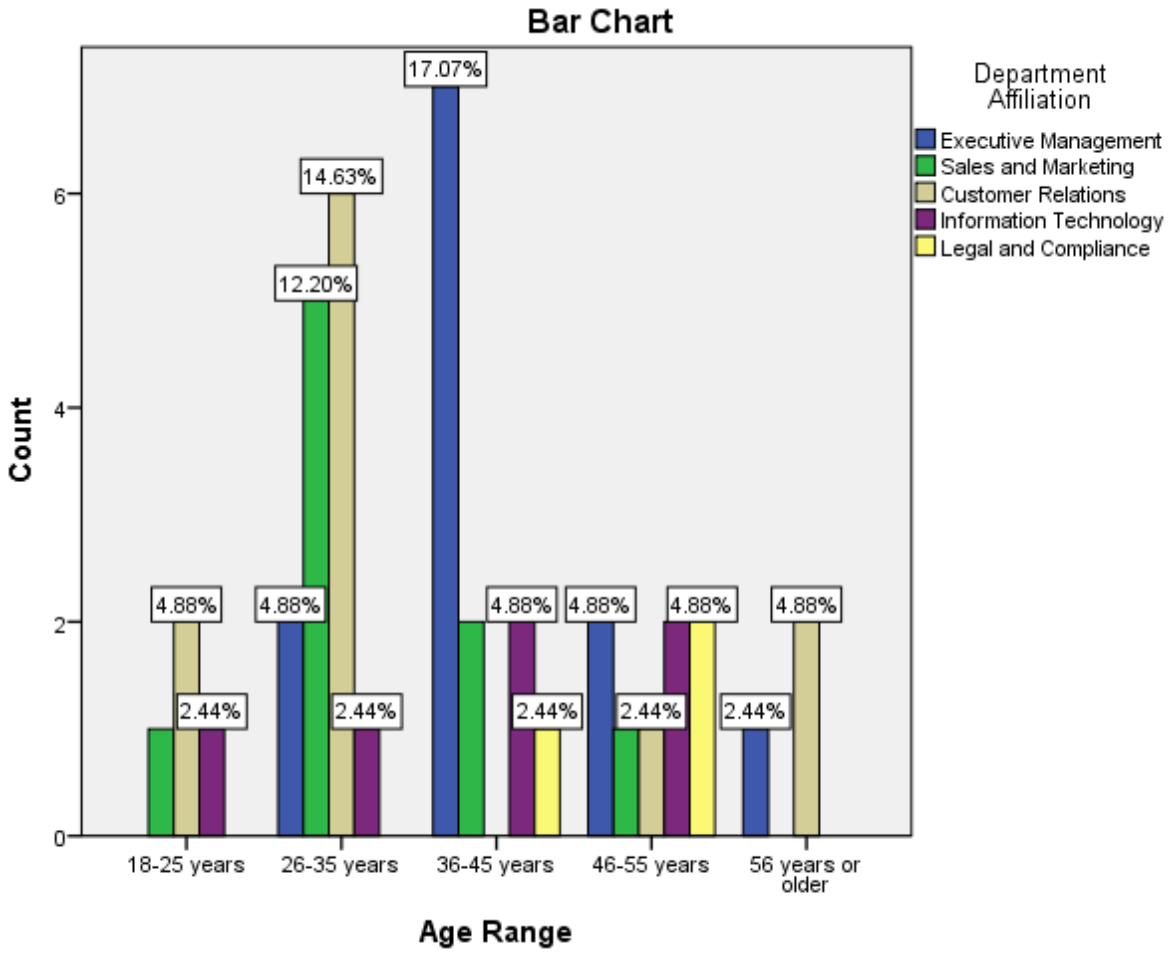


Table 12: *Crosstab: Age Range and How long have you worked at Dimitra International?*

		How long have you worked at Dimitra International?					Total
		Less than 1 year	1-3 years	4-6 years	7-10 years	More than 10 years	
Age Range	18-25 years	2	2	0	0	0	4
	26-35 years	2	10	2	0	0	14
	36-45 years	4	1	6	1	0	12
	46-55 years	0	1	1	4	2	8
	56 years or older	0	0	0	2	1	3
Total		8	14	9	7	3	41

Directional Measures

			Value
Nominal by Interval	**Eta**	Age Range Dependent	.782
		How long have you worked at Dimitra International? Dependent	.752

Age Range is strongly related to tenure at Dimitra International, with Eta values of 0.782 (Age dependent) and 0.752 (Work Experience dependent). This implies that age plays a major role in length of service, with an apparent expected pattern of increase, in that the older the employee, the more the time he or she is likely to serve the organization.

Figure 10: *Crosstab: Age Range and How long have you worked at Dimitra International?*

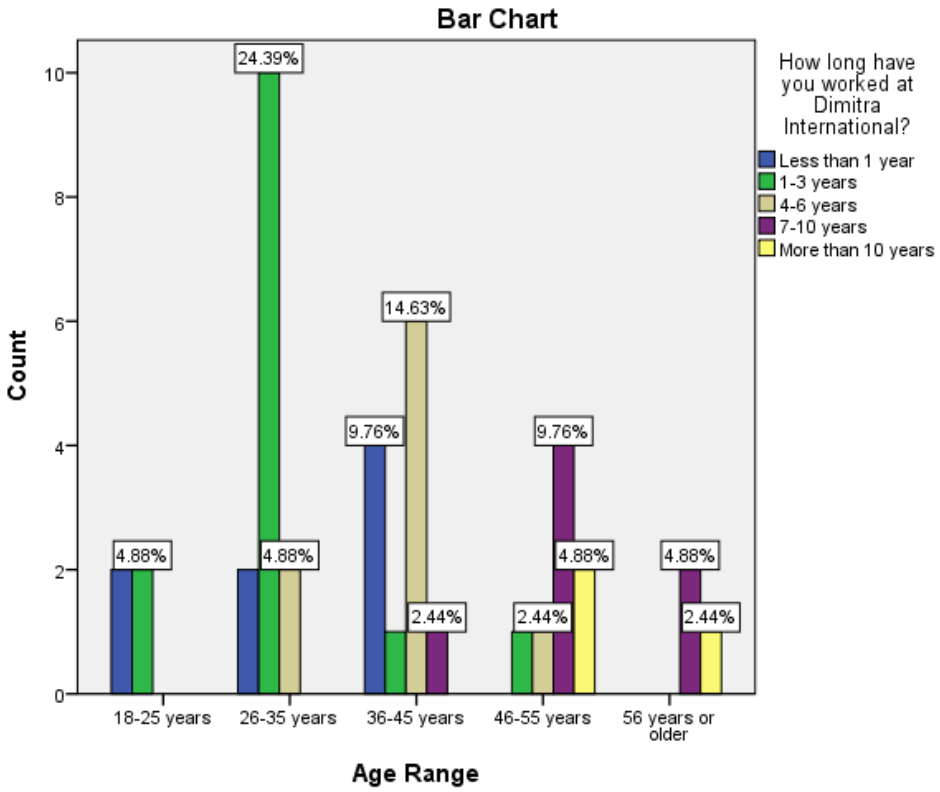


Table 13: *Crosstab: Age Range and Prior Experience with CRM Systems*

		Prior Experience with CRM Systems			Total
		I have used a CRM system extensively in a previous or current role	I have used a CRM system occasionally in a previous or current role	I have heard of CRM systems, but never used one	
	18-25 years	1	3	0	4

Age Range	**26-35 years**	9	3	2	14
	36-45 years	9	3	0	12
	46-55 years	5	2	1	8
	56 years or older	2	1	0	3
Total		26	12	3	41

Directional Measures

			Value
Nominal by Interval	**Eta**	Age Range Dependent	.144
		Prior Experience with CRM Systems Dependent	.240

Age Range, CRM experience shows a weak relationship with values of Eta of 0.144 and 0.240. It means that there is not much correlation between age and CRM use. The distribution of CRM experience is relatively even across the age groups, which means that demographic factors of age do not have a strong influence on whether a person is exposed to CRM systems in this sample.

Figure 11: *Crosstab: Age Range and Prior Experience with CRM Systems*

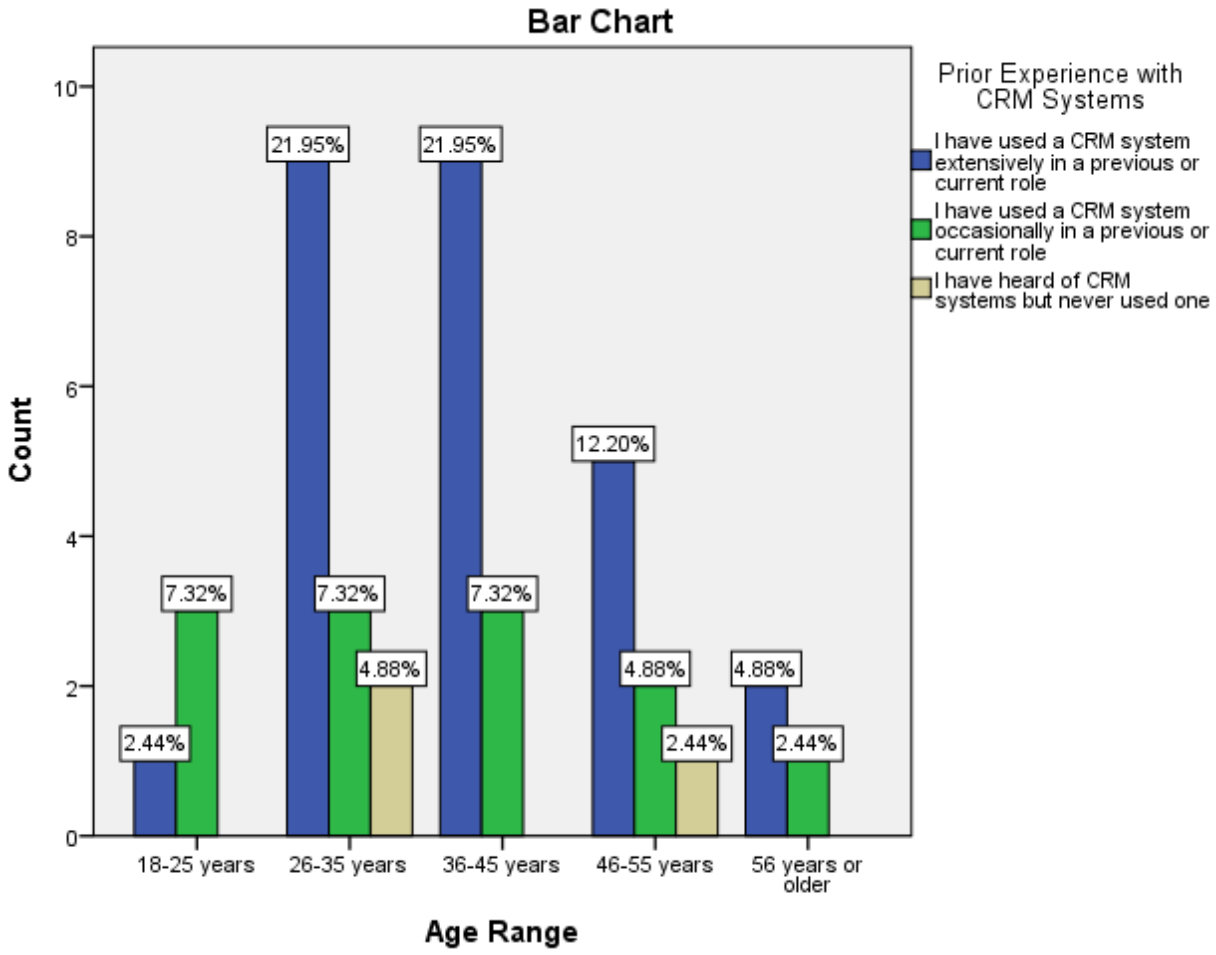


Table 14: *Crosstab: Age Range and Primary Work Location*

		Primary Work Location	Total
		United States	
Age Range	18-25 years	4	4
	26-35 years	14	14
	36-45 years	12	12
	46-55 years	8	8

	56 years or older	3	3
Total		41	41

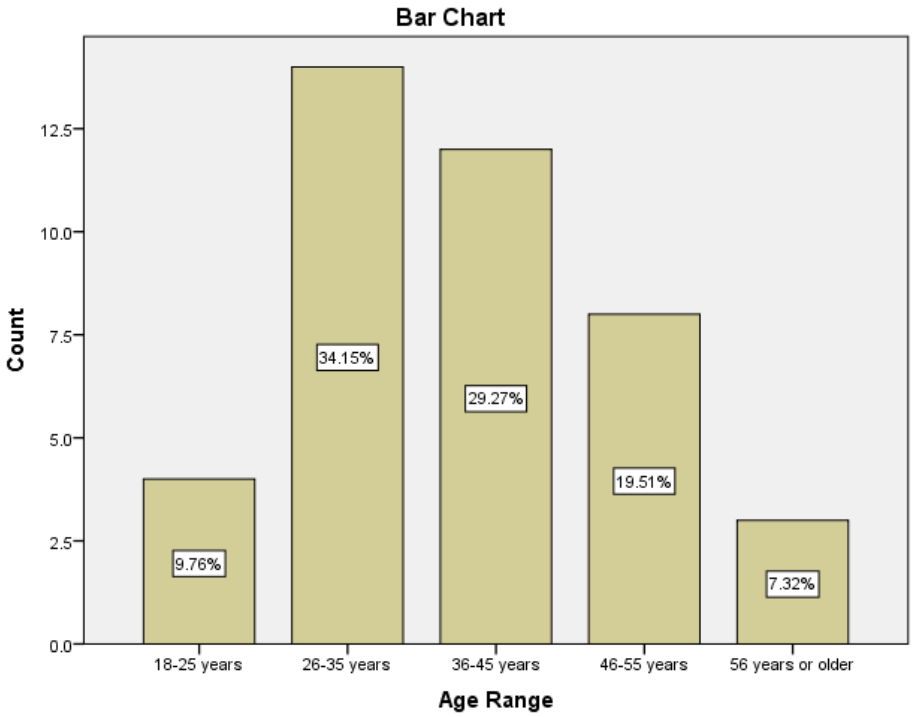
Directional Measures

			Value
Nominal by Interval	**Eta**	Symmetric	.a

a. No statistics are computed because Primary Work Location is a constant.

No Eta statistics are calculated since the Primary Work Location is the same among all the respondents (only in the United States). This means that the dataset has no variability in this variable and is therefore not suitable to compare the statistics or test the association with Age Range or any other demographic variable.

Figure 12: *Crosstab: Age Range and Primary Work Location*



5.2.4. *Pearson Correlation*

Table 15: *Correlation*

Correlations					
		CRM Adoption Readiness	**Perceived Ease of Use**	**Social Influence**	**Facilitating Conditions and Adoption Intention**
CRM Adoption Readiness	Pearson Correlation	1	.520**	.388**	.486**
	Sig. (2-tailed)		.000	.030	.041
	N	41	41	41	41
Perceived Ease of Use	Pearson Correlation	.520**	1	.313*	.369*
	Sig. (2-tailed)	.000		.047	.018
	N	41	41	41	41
Social Influence	Pearson Correlation	.388**	.313*	1	.409**
	Sig. (2-tailed)	.030	.047		.008
	N	41	41	41	41
Facilitating Conditions and Adoption Intention	Pearson Correlation	.486**	.369*	.409**	1
	Sig. (2-tailed)	.041	.018	.008	
	N	41	41	41	41
***. Correlation is significant at the 0.01 level (2-tailed).*					
**. Correlation is significant at the 0.01 level (2-tailed).*					

The correlation analysis shows that CRM Adoption Readiness is positively and significantly correlated with Perceived Ease of Use ($r = 0.520$, $p < 0.01$), showing that the higher the perceived ease of use, the higher the adoption readiness. Social Influence also has a significant positive correlation ($r = 0.388$, $p = 0.030$), suggesting that social influence (such as peer and leadership support) is associated with positive adoption. CRM Adoption Readiness is also significantly correlated with Facilitating Conditions and Adoption Intention ($r = 0.486$, $p = 0.041$), suggesting that organizational support and the willingness to adopt are also important factors for adoption readiness. Overall, the three perceptual factors - perceived ease of use, social influence, and facilitating conditions - are all significantly related to CRM Adoption Readiness, which implies that ease of use, social support, and enabling conditions are critical factors for successful CRM initiatives at Dimitra International.

5.3. Congruent Triangulation of Qualitative and Quantitative Findings

The synthesis of qualitative and quantitative data is a powerful convergent story about the CRM implementation at Dimitra International, which demonstrates an evident agreement between statistical data and the first-hand experience of employees. Together, the two datasets indicate that although the perceived preparedness of the organization to implement CRM is high, there are still serious structural, behavioral, and usability-related obstacles that predefine the outcome of adoption.

On the qualitative side, the results are consistent in revealing disjointed systems and inefficient data practices among departments. According to the Chief Executive Officer (Interview 1), client information is processed by the use of a mix of Microsoft Outlook, Excel spreadsheets, and SharePoint-based documentation systems, and the Customer Relations Manager (Interview 3) also confirms that they work with email correspondence, WhatsApp-based communication, and internal records that are managed manually. The quantitative findings are powerful evidence of these insights, as high perceived ease of use (Mean = 4.415) and high facilitating conditions (Mean = 4.341) mean that employees understand that they need improvement, but work in a fragmented technological environment.

Furthermore, statistical results provide great support to the qualitative theme of technological and human barriers. Less training, onboarding, and resistance to change are repeated several times by employees. An example of this is that the Sales and Marketing Manager (Interview 2) says that systems are perceived as extra work, but not as productivity-increasing tools, and the Frontline Employee (Interview 6) points out that there is a lack of proper training and support on systems implementation. These impressions are in line with the standard deviation in facilitating conditions (SD = 0.8249), which is relatively high, implying variability in the perceived organizational support. The lack of prior CRM exposure (Mean = 1.439) is also a quantitative measure that qualitative statements regarding resistance as the effect of unfamiliarity and not the refusal to adopt the concept per se are met as true.

Interestingly, both sets of data overlap on the perceived usefulness of CRM systems. In all interviews, respondents admit to huge advantages. The CEO (Interview 1) also focuses on a centralized platform to manage client data and facilitate strategic

decisions based on data, whereas the IT Manager (Interview 4) mentions centralized data storage and better integration of systems. Equally, Legal and Compliance Manager (Interview 5) emphasizes the use of automated audit trails and improved regulatory compliance. This qualitative agreement is supported by high average scores in successful CRM implementation (Mean = 4.512), which demonstrates a good overall optimism concerning the CRM potential in spite of operational limitations.

Nevertheless, a major distinction is that which is perceived as usefulness and those that are related to usability. Although the quantitative results indicate a high perceived ease of use (Mean = 4.415), the qualitative data indicate that there are still lingering fears of complexity and workload. The Customer Relations Manager (Interview 3) cautions that complicated systems can slow down service provision initially, whilst the Sales and Marketing Manager (Interview 2) is concerned with the time needed to enter the data. This implies that the employees conceive the CRM to be easy to use, but the reality on the ground has not been resolved, meaning that there is a cognitive-operational gap.

In addition, correlation analysis enhances triangulation of datasets. Successful CRM deployment is significantly correlated with perceived ease of use ($r = 0.520$, $p < 0.01$), social influence ($r = 0.388$, $p < 0.05$), and facilitating conditions ($r = 0.486$, $p < 0.05$). The results are a direct indication of the qualitative findings in which the support of leadership, peer influence, and systematic implementation are reiterated. To illustrate, the CEO (Interview 1) emphasizes the strong leadership support with the help of financial investment and training, whereas the Sales and Marketing Manager (Interview 2) emphasizes the need to focus on user-friendly, step-by-step implementation strategies. This congruence drives home the point that organizational preparedness is not absolute but very dependent on the quality of execution.

Also, the demographic study further contextualizes the dynamics of adoption. Although the age and tenure indicate a strong correlation ($\eta = 0.782$) and that the workforce is stable, the weak correlation between age and CRM experience ($\eta = 0.144$) makes it clear that CRM familiarity is not age-related. This substantiates qualitative results that organizational exposure and training gaps are more likely to create resistance compared to demographic segmentation. The combined results, in general, indicate a consistent yet warning image. Dimitra International exhibits high strategic intent and favorable perceptions about CRM adoption, but its success is limited due to fragmented systems, inconsistent training, and usability issues. The overlapping of the qualitative and quantitative findings highlights the fact that the success of CRM implementation will not be based on the availability of technology but rather the organizational willingness, change management, and user-friendly system design.

6. Discussion

6.1. Organizational Obstacles to Adopting CRM: Multidimensional Task

These results indicate that the obstacles to the implementation of CRM at Dimitra International are not isolated and are more

profound at the same time, at both the technological and human levels. On a qualitative level, a continuous reliance on disjointed systems like Microsoft Outlook, Excel, and WhatsApp depicts a structural shortcoming that Pissarra et al. (2025) would refer to as an organizational process of systematic governance versus the development of processes in an organization. This fragmentation is not just a mere inconvenience; rather, it represents established information silos that effectively detract from the relational intelligence that a CRM system is meant to develop.

More crucially, the quantitative information raises the issue of tension, which requires a thorough interpretation. Although these structural shortcomings were evident, employees gave a high favorability rating on all the perceptual constructs. This seemingly contradictory situation, where the readiness scores are very high but operational fragmentation is observed, indicates what Buttle and Maklan (2019) cautioned against: organizations that show positive perceptions about CRM without the organizational change that would support meaningful adoption. That is, a positive attitude towards the concept of CRM does not necessarily lead to a change in behavior in a transformative manner.

Moreover, individual unwillingness should not be attributed to the human aspect of resistance. Due to insufficient support of implementation, as Mossaei et al. (2025) argued, resistance in small and medium-sized enterprises is more often a consequence than a result of principled resistance to technology. This is well supported by the qualitative data, as the frontline employees identify the lack of training and onboarding structures as a reason, instead of individual resistance. This difference is essential to implementation planning: by viewing resistance as a cultural issue as opposed to a structural one, one is likely to misdiagnose the issue and, therefore, to mis devote remedial resources. Moving towards the diagnosis of barriers to the transition of understanding how employees assess the system itself, it is evident that the notions of usefulness and usability are critical as well.

6.2. Perceived Ease of Use: The Gap between the Cognitive Readiness and Operational Reality

In all six interviews, the interviewees were uniformly appreciative of the strategic importance of CRM, but at the same time, expressed a set of worries regarding the complexity of the systems, the high volume of data entry, and the high learning curve. This dichotomy is consistent with the Technology Acceptance Model developed by Davis (1989) that puts perceived ease of use as a core predictor of adoption intention - especially at the early critical stages when the users are yet to have real experience with the benefits of the system. As a matter of fact, this theoretical proposal is supported by the correlation analysis, which proves that ease of use has the most positive correlation with CRM adoption readiness in comparison with other constructs under analysis.

However, upon closer examination of these results, one will see a cognitive-operational gap that cannot be fully measured by solely the quantitative data. The fact that employees have reported high ease of use perceptions and, at the same time, fears of workload and complexity, points to the fact that the respondents are possibly gauging an idealized CRM concept as opposed to a

deployed operational reality. This difference resonates with the warning by Venkatesh et al. (2003) that the perception of ease of use can be overstated using self-reporting, without direct experience with the system, especially in the case of organizations with little previous exposure to CRM. This inflationary risk is particularly relevant with a low mean of the prior CRM experience in this sample.

Furthermore, these usability issues are heightened by the context in which the consultancy occurs in a manner that is not covered comprehensively by the generic technology acceptance literature. The literature points out that the value provided by the professionals working in legal and compliance settings is based on judgment, discretion, and relational acuity - not transactional throughput. Therefore, any system that is seen to add an administrative load without being matched by professional value is likely to cause a backlash that is not irrational at all but is all about professional identity. This supports the argument that ease of use should be architected into the system at the beginning, as opposed to being tackled retrospectively during the training. Leaving the individual perceptions aside, the social setting in which employees make adoption decisions is a layer of influence which is equally significant.

6.3. Social Influence: Leadership Visibility and Peer Endorsement as Adoption Catalysts

The qualitative data has a unified and clear message; employees base their attention on leadership behavior as an indicator of whether CRM adoption is sincerely appreciated or is a rhetorical issue. The focus on investment and resources devotion of the CEO and an appeal to user-based and gradual rollout strategies of the Sales and Marketing Manager are evidence of an implicit knowledge of the mechanisms of social influence without referring to theoretical frameworks. This is similar to the Unified Theory of Acceptance and Use of Technology, where Venkatesh et al. (2003) cited social influence, the extent to which significant persons approve technology use, as a fundamental cause of behavioral intention.

Nevertheless, the relationship between social influence and successful CRM implementation, though statistically significant, is the weakest of the three constructs studied. This is what needs to be critically addressed. It is reasonable that peer and hierarchical influence may be at work in a small consultancy where professional autonomy is highly valued compared to larger bureaucratic organizations where compliance with leadership directives is more the order of the day. Obuobisa-Darko (2023) warned that early employee engagement needs to be authentic as opposed to dictatorial, where employees feel that the leadership is only acting or commanding, then it can backfire and instead strengthen the feeling that professional discretion is being stamped on.

This conflict is especially relevant in consultancy contexts where the issues of secrecy and professionalism mentioned in the literature limit the extent to which the standardized CRM workflows may be enforced without negotiation. Thus, although social influence is still a useful adoption lever, it can only be effective at Dimitra International depending on the quality and authenticity of the leadership communication, but not its visibility. Formal support structures, and not informal social cues, are

what end up being subject to scrutiny, in terms of facilitating conditions.

6.4. Facilitating Conditions and Adoption Intention: Structural Enablement: The Determining Variable

As a construct that is arguably the most organizationally actionable, both datasets generate facilitating conditions. In qualitative terms, the employees of all positions are united by the same principal needs: the systematization of training, gradual introduction, customization of the role, accessibility on the mobile platform, and the ability to provide support after the deployment. This convergence makes sense in theory - Finnegan and Currie (2010) defined organizational readiness as a precondition to successful adoption, which is not only technical infrastructure but also the psychological and process-level preparedness to maintain behavior change in the long run.

Most importantly, though, the generally larger standard deviation in which the facilitating conditions were found than the other constructs is an indication of the significant variability in the nature of the experience of organizational support in relation to position and department. The asymmetry of the belief of senior leadership in the availability of resources and the lived experience of frontline employees in the lack of sufficient support in the previous implementation of the system qualitatively explains this variability. This disconnect exemplifies the risk of strategic misalignment discovered by Payne and Frow (2013), in which the organizational intent and the operational execution are off-track, and the momentum of adoption created by investment itself is lost.

Besides, the correlation analysis has proved the existence of a strong positive relationship between facilitating conditions and adoption intention as compared to successful CRM adoption readiness. This result is in line with the framework of Venkatesh et al. (2003), which does not consider facilitating conditions as peripheral enablers, but rather as antecedents of both intention of usage and real system behavior. In the case of Dimitra International, in particular, the SME environment has further increased this dependency: unless there are specific resources to implement and specific information technology skills, even a well-designed CRM system will be underused, which Christodoulou et al. (2025) observed in similar small professional services firms.

6.5. Synthesis: Intersecting Factors and their overall impact on successful CRM Adoption Readiness

Combined, the evidence provided by the qualitative and quantitative strands of this research confirms that the successful implementation of CRM in Dimitra International is not the effect of a single variable but is the result of the joint action of the perceived ease of use, social influence, and facilitating conditions. Perceived ease of use influences the initial desire to use the system and is strongest when it is incorporated in the design of the system, as opposed to being mitigated by post-factum training. Adoption norms are supported by social influence mediated by genuine leadership involvement and peer approval, and this helps in decreasing ambiguity that commonly leads to resistance. Facilitating conditions are the structural scaffolding, training,

governance, technical support, and staged rollout, without which positive perceptions and social endorsement will only be a dream, as opposed to a reality.

Prominently, none of these influences works autonomously. A system that is seen to be easy to use, but which is not supported by the organization, will not proceed to be implemented without turning to consistent behavior. Similarly, powerful enabling conditions are not able to offset a complex or intrusive system that is in conflict with professional workflows and autonomy. The success of CRM is by nature a relational process across these three dimensions, as the people-process-technology framework of Chen and Popovich (2003) reminds us. The triangulated results of this research thus reiterate that perceived ease of use, social influence, and facilitating conditions all have a unique, statistically significant, practically meaningful impact on successful CRM implementation - and that a combination rather than a strength of them that will ultimately result in successful or failed implementation at Dimitra International.

7. Conclusion and Recommendations

7.1. Conclusion

This research aimed at exploring how Dimitra International can achieve a successful CRM implementation that will not only improve the management of clients but also the efficiency of the company. The study, based on a convergent mixed-methods design, which involves six semi-structured interviews and a quantitative survey of 41 employees, has generated a multi-layered, critically-informed insight into the organizational, perceptual, and structural contexts that will either make or break the adoption of CRM in this small-to-medium consultancy.

The results repeatedly indicate that Dimitra International is in a technologically fragmented state, where customer information is stored in tools that are not interconnected with each other, such as Microsoft Outlook, Excel, WhatsApp, and SharePoint. This fall apart is not simply an inconvenience in terms of operations, but a system failure of information governance in action that negatively impacts the relational intelligence that CRM systems are intended to facilitate. Importantly, though, this structural fact is coupled with high perceptual favorability to CRM in all categories of employees, indicating that the organization has the motivational prerequisites to adopt, but does not have the execution infrastructure to transform intent into long-term behavior. When the organizational change is not aligned with favorable perceptions, as Buttle and Maklan (2019) have warned, the result is symbolic adoption at best and wasted investment at worst.

In regard to the former sub-question, obstacles to the adoption of CRM are multidimensional, including technological disunity, insufficient training histories, and structurally induced resistance, and not individual-motivated resistance. In response to the second sub-question, employees acknowledge the possible utility of CRM in strategic, operational, and compliance aspects; nevertheless, there is a cognitive-operational distance whereby the idealized views of a simplified experience have not been subjected to actual system experience yet. Regarding the third sub-question, the body of literature on the best practices, including

the phased rollouts, role-differentiated training, cross-functional governance, and change management, is highly relevant to the context of Dimitra International and supported by employee suggestions at all levels of the hierarchy. In the fourth sub-question, the evidence is very strong that a phased, user-centered deployment plan prioritizing usability, leadership visibility, and continuous support infrastructure is an interdependent success condition.

The theoretical value of this work lies in the fact that the Technology Acceptance Model and the Unified Theory of Acceptance and Use of Technology are applied in a practical context of a professional services SME, an area which is poorly covered in CRM literature. The results confirm the hypothesis that the individual correlation between the perceived ease of use and successful CRM deployment is the highest, followed by facilitating conditions and social influence. Notably, but more importantly, the research claims that these constructs are not independent of each other. Their joint alignment, i.e., usability as a part of design, social norms as a part of an authentic leadership, and structural support as a part of a consistent delivery across roles, is the critical factor in the success of adoption.

Practically, this study establishes that the effective implementation of CRM at Dimitra International will not be through the selection of technology only. Instead, it requires an organizationally coordinated process that considers the human, structural, and technological aspects of change as inseparable. The relatively flat organizational culture with an emphasis on performance is a significant strength, as the decisions made by leaders can trickle down to the workforce faster than usual without bureaucratic interference. However, such an advantage can only be achieved when leadership commitment is converted into visible, consistent, and resource-rich action in the entire implementation lifecycle.

Overall, Dimitra International is at a strategic crossroad. The organizational readiness and perception availability exist; all that is needed is the planned and disciplined action of an implementation plan that puts people, processes, and technology into true alignment.

7.2. Recommendations

Based on the research findings, the following are the recommendations, which can be provided as rational and scalable measures that Dimitra International can implement to steer a successful CRM implementation.

Use a Pilot-Led, Phase Implementation Strategy

Instead of implementing a comprehensive CRM system across the organization, the first thing that Dimitra International should do is to implement a pilot project in one department- the Customer Relations department (most appropriate since it is a direct customer-facing department). In line with the evidence of pilot implementations provided by AlQershi et al. (2022), the practice will enable the organization to test system settings within real working situations, create initial success stories that create momentum, and uncover unexpected challenges prior to large-scale deployment. At every stage, it must be checked against established milestones prior to expansion, and that the resource commitments are commensurate with the results being shown. It is particularly

critical as the limitations of resources in SMEs have been reported by Kraus et al. (2022).

Invest in Role-Differentiation, Ongoing Training

Training should not be limited to system mechanics, but should include business processes, data standards, and the workflows of the individual departments. As Finnegan and Currie (2010) have determined, general training programs cannot be effective among different users. The usage patterns and information needs among sales and marketing staff, legal and compliance staff, and executive management are radically different. The training must be provided in phases, which are in line with rollout phases, with help desk assistance that is available, peer user groups, and refresher modules. This is a direct response to the structural origin of resistance in the qualitative results, as the frontline employees explained unwillingness to be onboarded in the same way as a reaction to insufficient onboarding, and not a personal reaction.

Form Cross-Functional Steering Committee

In an effort to curb the strategic misalignment prevalent in the works of Payne and Frow (2013), it is recommended that a governance structure that comprises all five departments, executive management, sales and marketing, customer relations, information technology, and legal and compliance, should be put in place before a vendor is selected. This committee must be able to make decisions related to system configuration, priorities in redesigning processes, and performance measurement criteria so that CRM capabilities are not limited by default logic in system designs.

Emphasis on Usability and Compliance-Integrated System Design

Since there is an indication of a cognitive-operational difference between the perceived and actual ease of use, system selection must be considered in relation to rigid criteria of usability, such as the design of an intuitive interface, mobile access, automatic entry of common data, and access controls depending on position. In the case of Dimitra International specifically, compliance-related aspects of the solution, like automated audit trail and centralized documentation, as emphasized by the Legal and Compliance Manager, should not be optional features, but mandatory selection criteria.

Organize Leadership Communication into an Adoption Strategy

Although social influence is the weakest correlate in the quantitative results, it is a lever that is significant when used authentically. Top management must be seen to be physically on the CRM system, recognize its strategic value publicly, and make progress transparent during implementation. As AlQershi et al. (2022) warned, performative or directive endorsement is backfiring in the professional environment that appreciates autonomy; hence, two-way communication should be implemented with well-structured employee feedback mechanisms being collected and worthwhile action taken.

The combination of these suggestions creates a holistic and incremental implementation plan that is conscious of the resource limitations of Dimitra International, professional culture, and the multi-jurisdictional environment in which it operates.

7.3. Future Research

Although this study offers a theoretically based and empirically validated examination of CRM adoption in Dimitra International, it has several research opportunities in the future based on its results and shortcomings.

First, the cross-sectional research design of this study captures employee perceptions at one moment, before actual CRM implementation. A longitudinal study of attitudinal and behavioral change along different phases of implementation, such as pre-deployment to the post-adoption stabilization, would give a much deeper understanding of how perceived ease of use, social influence, and facilitating conditions change as employees gain direct experience with the system.

Second, this research is restricted to one organization, and this restriction restricts the generalization of the research findings even though they are theoretically coherent. A more rigorous test of the existence of context-dependent versus structurally-uniform barriers and adoption determinants in the professional services sector would be feasible through comparative case studies across various small-to-medium consultancy firms with differing regulatory jurisdictions.

Third, the moderating influence of organizational culture should be investigated more overtly in the context of the UTAUT framework in the future, especially in the consultancy setting, where professional autonomy, norms of confidentiality, and the value creation based on knowledge create conditions that are not thoroughly covered in the literature on mainstream technology acceptance.

Such gaps would be significant to fill in the theoretical and practical literature of CRM implementation within the professional service industry of SMEs.

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Appendices

Appendix 1: SPSS Outcomes

Descriptive Statistics

	N	Minimum	Maximum	Mean	Std. Deviation
Department Affiliation	41	1.0	5.0	2.488	1.2673
How long have you worked at Dimitra International?	41	1.0	5.0	2.585	1.2037
Age Range	41	1.0	5.0	2.805	1.1004
Prior Experience with CRM Systems	41	1.0	3.0	1.439	.6344
Primary Work Location	41	1.0	1.0	1.000	.0000
Perceived Ease of Use	41	3.0	5.0	4.415	.5906
Social Influence	41	2.0	5.0	4.610	.6276
Facilitating Conditions and Adoption Intention	41	2.0	5.0	4.341	.8249
CRM Adoption Readiness	41	2.0	5.0	4.512	.6753
Valid N (listwise)	41				

Reliability Statistics

Cronbach's Alpha	N of Items
.807	9

Independent Samples Test

		Levene's Test for Equality of Variances		t-test for Equality of Means						
									95% Confidence Interval of the Difference	
		F	Sig.	t	df	Sig. (2-tailed)	Mean Difference	Std. Error Difference	Lower	Upper
Department Affiliation	Equal variances assumed	.039	.844	.553	39	.583	.5128	.9269	-1.3620	2.3876
	Equal variances not assumed			.502	1.085	.698	.5128	1.0206	-10.2844	11.3100
How long have you worked at Dimitra International?	Equal variances assumed	.002	.969	-.495	39	.624	-.4359	.8810	-2.2179	1.3461
	Equal variances not assumed			-.428	1.076	.739	-.4359	1.0186	-11.3974	10.5256
Age Range	Equal variances assumed	2.222	.144	-.914	39	.366	-.7308	.7995	-2.3479	.8863
	Equal variances not assumed			-.484	1.026	.711	-.7308	1.5096	-18.8048	17.3432
Prior Experience with CRM Systems	Equal variances assumed	.075	.785	-.138	39	.891	-.0641	.4657	-1.0060	.8778
	Equal variances not assumed			-.126	1.086	.919	-.0641	.5104	-5.4546	5.3264

Age Range * Department Affiliation

Crosstab

Count

		Department Affiliation					
		Executive Management	Sales and Marketing	Customer Relations	Information Technology	Legal and Compliance	Total
Age Range	18-25 years	0	1	2	1	0	4
	26-35 years	2	5	6	1	0	14
	36-45 years	7	2	0	2	1	12
	46-55 years	2	1	1	2	2	8
	56 years or older	1	0	2	0	0	3
Total		12	9	11	6	3	41

Directional Measures

			Value
Nominal by Interval	Eta	Age Range Dependent	.368
		Department Affiliation Dependent	.336

Age Range * Work Experience

Crosstab

Count

		How long have you worked at Dimitra International?					
		Less than 1 year	1-3 years	4-6 years	7-10 years	More than 10 years	Total
Age Range	18-25 years	2	2	0	0	0	4
	26-35 years	2	10	2	0	0	14
	36-45 years	4	1	6	1	0	12
	46-55 years	0	1	1	4	2	8
	56 years or older	0	0	0	2	1	3
Total		8	14	9	7	3	41

Directional Measures

			Value
Nominal by Interval	Eta	Age Range Dependent	.782
		How long have you worked at Dimitra International? Dependent	.752

Age Range * Prior Experience with CRM Systems

Crosstab

Count

		Prior Experience with CRM Systems			
		I have used a CRM system extensively in a previous or current role	I have used a CRM system occasionally in a previous or current role	I have heard of CRM systems but never used one	Total
Age Range	18-25 years	1	3	0	4
	26-35 years	9	3	2	14
	36-45 years	9	3	0	12
	46-55 years	5	2	1	8
	56 years or older	2	1	0	3
Total		26	12	3	41

Directional Measures

			Value
Nominal by Interval	Eta	Age Range Dependent	.144
		Prior Experience with CRM Systems Dependent	.240

Age Range * Primary Work Location

Crosstab

Count

		Primary Work Location	
		United States	Total
Age Range	18-25 years	4	4
	26-35 years	14	14
	36-45 years	12	12
	46-55 years	8	8
	56 years or older	3	3
Total		41	41

Directional Measures

			Value
Nominal by Interval	Eta	Symmetric	.[a]

a. No statistics are computed because Primary Work Location is a constant.

Correlation

Correlations

		CRM Adoption Readiness	Perceived Ease of Use	Social Influence	Facilitating Conditions and Adoption Intention
CRM Adoption Readiness	Pearson Correlation	1	.520**	.388	.486**
	Sig. (2-tailed)		.000	.030	.041
	N	41	41	41	41
Perceived Ease of Use	Pearson Correlation	.520**	1	.313*	.369*
	Sig. (2-tailed)	.000		.047	.018
	N	41	41	41	41
Social Influence	Pearson Correlation	.388	.313*	1	.409**
	Sig. (2-tailed)	.030	.047		.008
	N	41	41	41	41
Facilitating Conditions and Adoption Intention	Pearson Correlation	.486**	.369*	.409**	1
	Sig. (2-tailed)	.041	.018	.008	
	N	41	41	41	41

**. Correlation is significant at the 0.01 level (2-tailed).

*. Correlation is significant at the 0.01 level (2-tailed).

Appendix 2: Interview Responses INTERVIEW 1

Role: Chief Executive Officer

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?

As the Chief Executive Officer of Dimitra International, I am responsible for overseeing strategic direction, organizational growth, and client relationship management at a high level. In my daily work, client information is managed through a combination of Microsoft Outlook, Excel spreadsheets, and SharePoint-based documentation systems. While these tools allow for basic tracking and communication, they lack integration, which results in fragmented client data and limits real-time visibility across departments. Consequently, decision-making often depends on manually consolidated reports rather than dynamic data insights.

Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

Previous technology implementations have faced several obstacles, including employee resistance to change, lack of structured training programs, and insufficient communication during rollout phases. Additionally, integration with existing legacy systems proved challenging, often causing delays and operational disruptions. These issues could similarly affect CRM adoption if not addressed proactively.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

The primary barriers include limited technical readiness, integration complexities with existing systems, and regulatory constraints such as Know Your Customer (KYC) and data protection requirements. Furthermore, employees may perceive CRM as an additional administrative burden rather than a productivity tool, which could reduce engagement.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

A CRM system would significantly enhance efficiency by providing a centralized platform for client data management, enabling better tracking of interactions, improving communication across departments, and supporting data-driven strategic decisions. Advanced CRM systems such as Salesforce or Microsoft Dynamics 365 could also provide predictive analytics, helping the organization anticipate client needs and improve service delivery.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

My main concerns relate to data migration challenges, system complexity, and potential disruptions during the transition period. If the CRM system is not user-friendly or properly integrated, it could increase workload rather than streamline processes.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The organizational culture is moderately progressive, with openness toward innovation; however, adoption typically depends on clear leadership direction and demonstrated value. Employees tend to be cautious when adopting new systems due to past implementation challenges.

7. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership is likely to provide strong support through financial investment, training initiatives, and strategic guidance. However, the effectiveness of this support will depend on how well the implementation is planned and communicated.

8. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am highly prepared and willing to adapt, provided that the CRM system demonstrates clear efficiency gains, improved reporting capabilities, and alignment with organizational objectives.

Section Four: Recommendations for Implementation Strategy

9. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

A phased implementation approach, beginning with pilot testing in selected departments, would be most effective. This should be supported by comprehensive training, continuous feedback mechanisms, and clear communication of benefits.

10. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three key priorities would be:

- Seamless integration with existing systems
- Comprehensive employee training and support
- Ensuring data accuracy and security

The main pitfalls to avoid include rushed implementation, lack of user engagement, and insufficient change management strategies.

Closing Question

11. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

It is essential that the CRM system aligns with the organization's long-term strategic goals and regulatory requirements, ensuring both operational efficiency and compliance.

INTERVIEW 2

Role: Sales and Marketing Manager

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?

As the Sales and Marketing Manager at Dimitra International, I am responsible for overseeing client acquisition, lead generation, and maintaining long-term relationships with clients. Currently, client information is managed through a combination of Microsoft Excel spreadsheets, Outlook email communication, and LinkedIn Sales Navigator. While these tools support basic tracking, they are not integrated, which leads to duplication of data, inconsistent records, and difficulties in monitoring the complete customer journey.

Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

In previous implementations, the main obstacles included a lack of structured onboarding, insufficient user training, and limited clarity regarding the benefits of the system. Employees often viewed new systems as additional work rather than tools that enhance productivity. This resulted in low engagement and partial adoption, which ultimately reduced the effectiveness of the technology.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

Potential barriers include data inconsistency across departments, resistance from employees who are accustomed to existing processes, and a lack of system integration. Additionally, time constraints in sales roles may discourage staff from fully engaging with a new CRM system.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

A CRM system would significantly enhance sales and marketing performance by enabling centralized lead management, customer segmentation, and automated follow-ups. It would also improve campaign tracking and provide real-time analytics, allowing for more informed decision-making and improved customer targeting.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

One of my main concerns is the time required for data entry and system familiarisation, particularly during the initial stages of

implementation. If the system is overly complex or not user-friendly, it may reduce efficiency instead of improving it.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The organizational culture within the sales and marketing department is generally adaptable and performance-oriented, with a strong focus on achieving targets. However, employees are more likely to adopt new technologies if they clearly enhance efficiency and reduce workload. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership is expected to provide support through training programs, performance incentives, and clear communication regarding the benefits of the CRM system. However, consistent follow-up and engagement will be necessary to ensure successful adoption.

7. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am willing to adopt a new CRM system, provided that it is easy to use, integrates with existing tools, and demonstrates clear value in improving productivity and sales outcomes.

Section Four: Recommendations for Implementation Strategy

8. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

A user-friendly, phased implementation approach would be most effective, starting with core sales functions and gradually expanding to other departments. Practical, hands-on training sessions and integration with commonly used tools such as Outlook would also encourage adoption.

9. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three main priorities would be:

- Ease of use and intuitive design
- Automation of repetitive tasks
- Real-time reporting and analytics

The pitfalls to avoid include overly complex systems, a lack of employee involvement, and insufficient training.

Closing Question

10. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

It is important that the CRM system provides mobile accessibility and real-time updates, as sales activities often require flexibility and immediate access to client information.

INTERVIEW 3
Role: Customer Relations Manager

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?

As the Customer Relations Manager, I am responsible for maintaining client satisfaction, managing ongoing communication, and resolving client queries effectively. Currently, client information is handled through email correspondence, WhatsApp communication, and manually maintained internal records, which often leads to fragmented information. This lack of a centralized system makes it difficult to track the full history of client interactions and can result in duplication of effort and delays in response.
Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

Previous implementations have highlighted issues such as poor coordination between departments, a lack of standardized processes, and limited user engagement during system rollout. These challenges often resulted in inconsistent usage of systems and reduced overall effectiveness, which could also impact CRM adoption.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

A major barrier is the absence of a centralized communication system, which currently leads to siloed information across departments. Additionally, employees may resist adopting standardized processes, especially if they are accustomed to informal communication methods such as messaging platforms.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

A CRM system would significantly improve service delivery by enabling centralized tracking of all client interactions, faster response times, and better coordination between teams. It would also allow for improved monitoring of client issues and ensure that no requests are overlooked, thereby enhancing overall client satisfaction.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

My main concern is the learning curve associated with adopting a new system, particularly if it is complex or not user-friendly. Additionally, if the system disrupts existing workflows without providing clear benefits, it may initially slow down service delivery.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The organizational culture is generally supportive of improvement initiatives, but there is also a degree of caution when adopting new technologies. Employees prefer systems that are easy to use and clearly beneficial to their daily tasks.

7. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership support would be essential, particularly in terms of providing training, addressing employee concerns, and ensuring that the transition is well-managed. Active involvement from leadership would help build confidence among employees and encourage adoption.

8. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am moderately willing to adapt to a new CRM system, especially if it improves efficiency and simplifies communication. My willingness would increase if the system were user-friendly and supported by adequate training and guidance.

Section Four: Recommendations for Implementation Strategy

9. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

An effective approach would involve implementing a centralized system with user-friendly dashboards and integrating communication tools to streamline client interactions. Providing practical training and demonstrating real-world benefits would also be critical in encouraging adoption.

10. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three main priorities would be:

- Centralization of client information
- Effective tracking of interactions and service requests
- Comprehensive training for employees

The pitfalls to avoid include poor system design, lack of user input, and inadequate support during implementation.

Closing Question

11. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

A CRM system should primarily aim to reduce duplication of work and improve coordination between departments, ensuring a smoother and more efficient client experience.

INTERVIEW 4
Role: IT Manager

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?

As the IT Manager at Dimitra International, I am responsible for overseeing the organization's technological infrastructure, including data management systems, internal platforms such as SharePoint, and database administration. While I am not directly involved in client relationship management, I support the systems through which client data is stored and accessed. Currently, client information is dispersed across

SharePoint repositories, Excel files, and email systems which creates challenges in maintaining data consistency, accessibility, and security.

Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

Previous implementations have encountered challenges such as integration failures with legacy systems, a lack of clear technical requirements, and insufficient user testing prior to deployment. Additionally, limited collaboration between technical and non-technical teams has sometimes resulted in systems that do not fully meet user needs. These issues could significantly affect CRM adoption if not addressed.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

Key barriers include compatibility issues with existing systems, data migration complexities, and concerns related to cybersecurity and data protection. Furthermore, insufficient allocation of technical resources and budget constraints may limit the effectiveness of the implementation process.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

From a technical perspective, a CRM system would improve organizational efficiency by enabling centralized data storage, streamlined workflows, and improved integration between systems. It would also enhance data accuracy and reduce redundancy, allowing IT to manage systems more effectively and support business operations more efficiently.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

My primary concerns relate to cybersecurity risks, system vulnerabilities, and the complexity of integrating the CRM with existing infrastructure. Additionally, if the system requires extensive customization, it may increase maintenance workload and require additional technical expertise.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The organization is technically capable but somewhat resource-constrained, which can affect the speed and effectiveness of technology adoption. While there is openness to innovation, successful implementation depends heavily on proper planning and resource allocation.

7. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership is likely to provide support through budget allocation, strategic direction, and external consultancy if required. However, continuous engagement and monitoring will be necessary to ensure successful implementation.

8. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am fully prepared to adapt, provided that the system is technically sound, secure, and aligns with the organization's IT strategy. Adequate planning and resource support will be essential.

Section Four: Recommendations for Implementation Strategy

9. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

A structured implementation approach focusing on system integration, data governance, and security compliance would be most effective. This should include collaboration between IT and business units to ensure that the system meets both technical and operational requirements.

10. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three key priorities would be:

- Ensuring robust cybersecurity and data protection measures
- Achieving seamless integration with existing systems
- Maintaining scalability for future growth

The main pitfalls to avoid include poor system design, lack of technical planning, and underestimating resource requirements.

Closing Question

11. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

It is important to consider engaging external CRM specialists or consultants to ensure a smooth and technically sound implementation process.

INTERVIEW 5
Role: Legal and Compliance Manager

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?
As the Legal and Compliance Manager, I am responsible for ensuring that all client-related activities adhere to regulatory requirements, including KYC (Know Your Customer) procedures, data protection regulations, and internal compliance policies. Currently, client information is managed through document management systems, manual compliance records, and email communications, which can make it difficult to maintain consistency and ensure complete audit trails.

Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

Previous implementations have faced challenges such as misalignment with regulatory requirements, lack of compliance-focused system design, and insufficient stakeholder involvement during development. These issues often resulted in systems that required additional manual processes to meet compliance standards.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

Key barriers include strict regulatory requirements such as GDPR, KYC compliance obligations, and concerns regarding data privacy and confidentiality. Additionally, resistance may arise if the system does not fully support compliance workflows.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

A CRM system could significantly improve compliance management by providing automated audit trails, centralized documentation, and enhanced monitoring of client activities. This would improve transparency, reduce risk, and ensure that regulatory requirements are consistently met.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

My primary concern is related to data confidentiality and the risk of unauthorized access to sensitive client information. Additionally, if the system does not adequately support compliance requirements, it may increase manual workload rather than reduce it.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The organizational culture from a compliance perspective is generally risk-averse and cautious, particularly when adopting new systems that handle sensitive client data.

7. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership support is expected, particularly in ensuring that the system meets regulatory standards and provides adequate safeguards for data protection. However, strong oversight will be required throughout the implementation process.

8. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am cautiously willing to adapt, provided that the CRM system is fully compliant with regulatory requirements and enhances, rather than complicates, compliance processes.

Section Four: Recommendations for Implementation Strategy

9. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

An effective approach would involve embedding compliance features into the CRM system from the outset, including role-based access controls, automated compliance checks, and secure data management processes.

10. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three main priorities would be:

- Ensuring data protection and confidentiality
- Incorporating compliance and regulatory requirements
- Providing transparent audit trails

The pitfalls to avoid include inadequate security measures, lack of compliance integration, and insufficient stakeholder involvement.

Closing Question

11. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

It is essential that compliance considerations are integrated into the system design from the beginning, rather than added later as an afterthought.

INTERVIEW 6
Role: Frontline Employee

Opening Question (Warm-up)

1. Could you please describe your current role at Dimitra International and how you currently manage client information and relationships in your daily work?
As a frontline employee, I am responsible for handling day-to-day client interactions, including responding to queries, updating records, and supporting administrative tasks. Currently, client information is managed through Excel spreadsheets and email communication, which often requires manual updates and can lead to errors or delays in accessing information.

Section One: Organizational Barriers to CRM Adoption

2. Reflecting on your experience with previous technology implementations at Dimitra International, what obstacles have emerged that might also affect the adoption of a new CRM system?

One of the main challenges has been the lack of proper training and support during system implementation, which made it difficult for employees to adapt to new tools. As a result, some systems were not fully utilized.

3. What specific organizational barriers do you anticipate could hinder the successful implementation of a CRM system in this company?

Barriers may include limited time to learn the system, a lack of technical skills among some employees, and resistance to changing established routines.

Section Two: Perceptions of CRM Usefulness and Usability

4. In what ways do you believe a CRM system could improve your ability to serve clients and perform your job effectively?

A CRM system could improve efficiency by providing quick access to client information, better tracking of tasks, and automated reminders for follow-ups, which would help ensure that no client requests are missed.

5. What concerns do you have about using a CRM system that might make your work more difficult or time-consuming?

My main concern is that the system may require additional data entry and increase workload, especially if it is not simple and easy to use.

Section Three: Change Preparedness

6. How would you describe the organizational culture at Dimitra International regarding the adoption of new technologies and work processes?

The culture is somewhat mixed, as some employees are open to new technologies while others prefer to continue using familiar methods.

7. To what extent do you feel that leadership at Dimitra International would support employees through the transition to a new CRM system?

Leadership support would be important, particularly in providing training, guidance, and ongoing assistance during the transition.

8. How prepared and willing are you personally to adapt your current work routines to incorporate a new CRM system?

I am willing to adapt, especially if the system is easy to use and helps reduce workload rather than increase it.

Section Four: Recommendations for Implementation Strategy

9. Based on your understanding of Dimitra International's unique context as a legal, financial, and compliance consultancy, what implementation approach would most effectively encourage employee adoption of a CRM system?

A simple and practical approach would be most effective, including step-by-step training, clear instructions, and ongoing support to help employees feel comfortable using the system.

10. If you could design the CRM implementation process yourself, what three priorities would you establish to ensure success, and what pitfalls would you most want to avoid?

The three main priorities would be:

- Ensuring ease of use
- Providing adequate training and support
- Improving the speed and efficiency of tasks

The pitfalls to avoid include overcomplicating the system, a lack of training, and poor user support.

Closing Question

11. Is there anything else you would like to share about CRM implementation at Dimitra International that we have not discussed in this interview?

It would be beneficial if the CRM system were mobile-friendly and accessible, allowing employees to manage tasks efficiently even when working remotely.

Appendix 3: Survey Questionnaire

Survey Questionnaire: CRM Adoption at Dimitra International

Purpose of this Survey: This questionnaire aims to understand employee perceptions regarding the adoption of a Customer Relationship Management (CRM) system at Dimitra International. Your responses will help identify factors that influence technology acceptance and inform the development of an effective implementation plan tailored to our organization's needs.

Confidentiality Statement: All responses are anonymous. No identifying information will be collected or reported. Data will be analyzed in aggregate only and used solely for academic research purposes.

Estimated Completion Time: 10-15 minutes

Consent: By completing and submitting this questionnaire, you indicate your voluntary consent to participate in this research.

Section One: Demographic and Role Information

Please select the option that best describes your situation.

1. Department Affiliation:

- Executive Management
- Sales and Marketing
- Customer Relations
- Information Technology
- Legal and Compliance
- Other (please specify: _____)

2. How long have you worked at Dimitra International?

- Less than 1 year
- 1 to 3 years
- 4 to 6 years
- 7 to 10 years
- More than 10 years

3. Age Range:

- 18-25 years
- 26-35 years
- 36-45 years

- 46-55 years
- 56 years or older

4. Prior Experience with CRM Systems:

- I have used a CRM system extensively in a previous or current role
- I have used a CRM system occasionally in a previous or current role
- I have heard of CRM systems, but never used one
- I have no knowledge of CRM systems

5. Primary Work Location:

- United States
- Germany
- Italy
- Spain
- Portugal
- Other (please specify: _____)

Section Two: Perceived Usefulness

Please indicate your level of agreement with each statement below.

Statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
6. Using a CRM system would improve my ability to serve clients effectively	☐	☐	☐	☐	☐
7. A CRM system would help me accomplish my tasks more efficiently	☐	☐	☐	☐	☐
8. Using a CRM system would enhance my productivity in client-related activities	☐	☐	☐	☐	☐
9. A CRM system would make it easier for me to track client interactions and history	☐	☐	☐	☐	☐
10. Using a CRM system would increase my chances of meeting client expectations	☐	☐	☐	☐	☐
11. Overall, I believe a CRM system would be valuable for my work at Dimitra International	☐	☐	☐	☐	☐

Section Three: Perceived Ease of Use

Please indicate your level of agreement with each statement below.

Statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
12. Learning to operate a CRM system would be easy for me	☐	☐	☐	☐	☐
13. I would find it simple to accomplish basic tasks using a CRM system	☐	☐	☐	☐	☐
14. My interaction with a CRM system would be clear and understandable	☐	☐	☐	☐	☐
15. I would quickly become skillful at using a CRM system	☐	☐	☐	☐	☐
16. I would find a CRM system flexible enough to adapt to my working style	☐	☐	☐	☐	☐
17. Overall, I believe a CRM system would be easy to use in my daily work	☐	☐	☐	☐	☐

Section Four: Social Influence

Please indicate your level of agreement with each statement below.

Statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
18. My manager believes that I should use a CRM system for my work	☐	☐	☐	☐	☐
19. My colleagues would expect me to use the CRM system regularly	☐	☐	☐	☐	☐
20. People in my department whose opinions I value would support my use of a CRM system	☐	☐	☐	☐	☐
21. The leadership team at Dimitra International would encourage employees to adopt the CRM system	☐	☐	☐	☐	☐

Section Five: Facilitating Conditions and Adoption Intention

Part A: Facilitating Conditions

Please indicate your level of agreement with each statement below.

Statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
22. I believe Dimitra International would provide adequate training for the CRM system	☐	☐	☐	☐	☐
23. I would have access to technical support when I encounter problems with the CRM system	☐	☐	☐	☐	☐
24. The necessary hardware and Software would be available for me to use the CRM system effectively	☐	☐	☐	☐	☐
25. Dimitra International would allocate sufficient time for employees to learn and adapt to the CRM system	☐	☐	☐	☐	☐

Part B: Adoption Intention

Please indicate your level of agreement with each statement below.

Statement	Strongly Disagree (1)	Disagree (2)	Neutral (3)	Agree (4)	Strongly Agree (5)
26. Assuming I have access to a CRM system, I intend to use it for my work	☐	☐	☐	☐	☐
27. I would use a CRM system regularly as part of my daily responsibilities	☐	☐	☐	☐	☐
28. I would recommend that my department adopt a CRM system for client management	☐	☐	☐	☐	☐

29. I would be willing to invest time learning how to use a CRM system effectively	☐	☐	☐	☐	☐

Section Six: Open Feedback (Optional)

30. Do you have any additional comments, concerns, or suggestions regarding CRM implementation at Dimitra International?

Thank you for completing this survey.

Your participation is greatly appreciated and will contribute to developing an effective CRM deployment plan for Dimitra International.

https://docs.google.com/forms/d/14ceE2nqzvMg6fNzI31pqBeN9U5tJ-EQcZwaWfrlDnII/edit#responses