

## CRM Software Adoption by Small Enterprises

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### Abstract

Customer relationship management (CRM) is a business approach which can provide a competitive advantage to small and medium sized enterprises (SMEs). To deploy a successful CRM strategy, SMEs need to invest in a CRM software but unfortunately, the adoption rate of such software is very low compared to large companies. This study is trying to identify the main reasons for not using CRM software and how adoption rate can be improved. In-depth interviews with marketing managers and business owners were conducted to investigate the types of relationships the organizations have with various stakeholders and find out the technical solutions used to implement CRM strategies. Several reasons were mentioned for not using, or using in a limited way, CRM software: they are not trusted, they do not work, they are too complicated or they are not needed because SMEs have a limited customer base and managing customer relationships is performed using simpler tools. The main problem is that respondents do not see the strategic importance of CRM software. As long as most respondents consider only the operational role of CRM software - which can be replaced with some success by other applications they already use - the adoption rate will continue to be limited.

**Keywords:** customer relationship management, CRM software, small and medium sized enterprises, artificial intelligence.

**JEL classification:** M31, O33.

## 1. Introduction

Small and medium sized enterprises (SMEs) represent the backbone of the economy given their sheer number, their important role as employer and their potential for innovation. To survive and prosper, SMEs need to identify and exploit a set of competitive advantages. For example, market orientation can be an efficient business approach under certain conditions. It is based on customer orientation and involves gathering information about their needs and wants and using that information in value creation processes (Kohli and Jaworski, 1990). For SMEs - given their characteristics such as closeness to market, deep customer knowledge, flexibility and high responsiveness (McCartan-Quinn and Carson, 2003) - customer relationship management (CRM) is an important source of competitive advantage. Effective and efficient customer relationship management is based on the business philosophy that puts customers at the heart of the business, and on the CRM technology needed to implement it.

In general, the technology adoption rate in SMEs is relatively low compared to large companies. Moreover, Romania has the lowest adoption rate of digital technologies compared to the rest of EU member states (European Commission, 2022).

A possible explanation is the high costs for purchasing and using CRM software. Although there are now cloud technology solutions that have considerably reduced the costs of installing and operating these applications, Romanian SMEs seems to not use at all cloud computing (DELab UW, 2016). Recently, CRM software have started to integrate artificial intelligence (AI) features which makes them more sophisticated in managing customer relationships and have improved their analytical capabilities allowing them to generate valuable insights that can be integrated into value creation processes.

This new generation of software has already started to be used by large companies, thus widening the gap between them and SMEs. Hence it is important to understand why SMEs do not use or – in some cases - even avoid using CRM software. Therefore, our research question is: how can we improve the adoption rate of CRM software by SMEs?

The article is organized as follows: the next section presents a systematic review of the most important papers on his topic followed by the research methodology. In the last sections we will discuss our results and conclusions together with some recommendations.

## 2. Literature review

CRM emerged in the late 1990s and is often used interchangeably with relationship marketing, even if these are distinct concepts. According to Payne and Frow (2013) relationship marketing is a much broader term which refers to the strategic management of relationships with all relevant stakeholders, while CRM is focusing only on customer relations involving the appropriate use of technology.

The increasing interest in CRM is explained by important trends (Payne and Frow, 2013) which have shaped the business environment: customers are considered to be now a business asset, therefore the focus has switched to relationships instead of transactions; companies are re-organized from functions to processes to act more strategically; the greater use of technology in maximizing the value of information and the benefits of using information proactively rather than reactively.

There are numerous definitions of CRM ranging from a specific technology to a general approach for managing customer relationships to create value for both company and customers (Arman, 2014). Nowadays, researchers have generally adopted the holistic definition which is about business activities and processes supported by technology and strategy designed to improve organizations performance by developing long term relationships with specific customers (Venturini and Benito, 2015; Guerola-Navarro et al., 2022; Pynadath, Rofin and Thomas, 2022).

As a business philosophy CRM is particularly relevant for entrepreneurial ventures and has proven to have a major positive impact. Collecting information in a consistent and centralized way, about the interactions with customers and using that information to design successful strategies aimed at acquiring, keeping and developing the customer base is particularly important for entrepreneurial companies (Guerola-Navarro et al., 2022). By collecting information about previous interactions through multiple contact points, companies can firstly identify the best customers and invest in building profitable relationships with them (Deszczyński and Beręsewicz, 2021) and secondly – can create and co-create value with customers through knowledge brokering (Jackson and Ahuja, 2016; Itani, Kalra and Riley, 2022).

Adopting a CRM approach is highly correlated with firms' performance in terms of sales level, sales effectiveness (Pynadath, Rofin and Thomas, 2022), higher client retention and acquisition, a better understanding of buyers' needs (Rodriguez and Honeycutt, 2011) and a way to create new customer value (Hunke, Heinz and Satzger, 2022). Obviously, CRM is not the only available successful business approach, but once companies achieved a state of

relationship maturity it will provide a sustainable competitive advantage (Deszczyński and Beręsewicz, 2021).

To implement a CRM strategy, a CRM software must be used to link the front office employees – from sales and customer service – with back-office functions such as finance, operations and logistics (Venturini and Benito, 2015). This software has a standardized structure which consists of operational and analytical modules. While the first one is used to automate selling, marketing and service processes, the last one is used to aggregate customer data and generate information and insights for business decisions. The evolution of CRM technology has been impressive (Kumar and Reinartz, 2006). In the first phase, CRM software was used for functional purposes to support the sales and customer service departments by generating leads, creating sales quotes, placing sales orders and addressing after-sales activities. Because those databases worked with customer information isolated from other systems, in the second phase the objective was to create a single view of all interactions with customers, regardless of the purpose of that interaction (pre-sales, sales transaction or post-sales service). The third stage had a more strategic focus, trying to integrate front-end with back-end systems, as well as with the systems used by business partners. The main goal achieved in this stage was to increase revenues and not only to control costs. In the fourth stage, a growing number of small companies started to adopt it due to its agility, flexibility, and low fixed costs, given that CRM technology started to provide on-demand functionality and was available on a pay-per-use basis. In the next stage CRM software was integrated with web 2.0 and social media thus allowing a better engagement of the customers and an intensive use of data driven insights to optimize customer experience. To personalize and improve the online experience of customers, data-mining features (Pynadath, Rofin and Thomas, 2022) and even chatbots were integrated into CRM software (Camilleri and Troise, 2023). During COVID -19 pandemic, CRM software started to be used intensively through mobile devices such as tablets and smartphones which enabled sales professionals – due to real time location-based services supported by mobile technology - to record customer interactions in real time and to have a more personal and interactive dialogue with prospects (Rodriguez and Boyer, 2020).

Today, a hot topic is related to the role of integrating AI in CRM software (Chatterjee et al., 2023) and how AI-CRM technology enhance relationship management with end-customers. AI is about algorithms, programs, systems and machines that demonstrate intelligence supported by key technologies such as machine learning, neural networks and robotic process automation (Wei and Pardo, 2022). Recent studies have proven the benefits of using AI embedded CRM systems in a business-to-business context: due to the fact that it can automate the analysis and recommendation process, it will increase the operational efficiency, it will improve collaboration in managing business-to-business relations and thus enhance customers' satisfaction (Chatterjee, Chaudhuri and Vrontis, 2022). Using AI-CRM-based software will increase the competitiveness of the firm which will help to protect its competitive advantage (Chatterjee et al., 2022).

As it is the case with other software adoption, initially the rate of successful implementation was low, less than 30% which cannot justify the costs with it (Reichheld, Schefter and Rigby, 2002). One of the major issues is user adoption, employees avoiding to use it due to both organizational and technical issues (Goodhue, Wixom and Watson, 2002). When a new technology is introduced, employees lack trust and perceive it as a risk to their jobs. Therefore, the role of managers is critical to encourage them to use it (Chatterjee et al., 2022). Still, this is not enough. It seems that the implementation phase is more important to CRM success. Firms with better IT infrastructure, business practices and skills are more likely to have success in this phase (Suoniemi et al., 2021). Technology readiness has a positive

impact on CRM software adoption, therefore managers should stay updated with the latest technological trends (Rahman et al., 2023).

As we have mentioned earlier, SMEs adoption rate is lower than large companies. It is important to understand why the adoption of digital technologies and cloud computing – which is highly relevant for SMES - is very low. Cloud computing is a disruptive technology which is used to avoid the need for hardware investments for expensive information technology. Low costs and flexibility are some of the major benefits (Shetty and Panda, 2021), therefore CRM technology has been growing since 2000 particularly with the emergence of cloud computing platforms (Guerola-Navarro et al., 2022). Still the adoption rate of cloud computing CRM is extremely low - in Romania being almost inexistent – therefore it is useful to understand why (DELab UW, 2016).

### 3. Research methodology

As we have mentioned earlier, the goal of this research is to find out how the adoption rate of CRM software by SMEs can be improved. To achieve this goal, we conducted a qualitative research between September-October 2022 under the form of in-depth interviews allowing respondents to express their own opinions using their own words. The research objectives were: (a) to investigate the types of relationships the organizations have with various stakeholders (suppliers, distributors, other business partners); (b) to explore what type of customer relationship management strategies are preferred; (c) to identify the technical solutions used by organizations to implement customer relations strategies; (d) to analyze CRM software perception and (e) to identify major functionalities needed for a CRM software.

The research sample was made of 10 companies out of which seven micro-enterprises (below 10 employees), two small companies (10-49 employees) and one medium sized company (50-249 employees). We have selected enterprises from various industries: printing services, distribution of construction materials, software development, travel agency, marketing agency, dental equipment manufacturer, educational and entertainment services.

Companies are addressing all types of markets: five are focusing on business-to-business customers, one is serving only consumers and four are addressing both types of customers. In terms of age, the sample consists of both young and old companies: three companies are younger than five years, three companies are in between five to ten years and four companies are older than 10 years.

The respondents were marketing managers responsible for customer management and entrepreneurs with a key executive role and were selected based on recommendations. The interviews lasted around 60 minutes and were audio-recorded. For the data analysis, the content analysis was applied to interviews transcripts. To reduce research bias two researchers were involved in analyzing data and comparing the findings. In order to support our conclusions we have added verbatim descriptions of participants' accounts.

### 4. Results and discussions

Considering the *first research objective (a) to investigate the types of relationships the organizations have with various stakeholders - suppliers, distributors, other business partners:*

In terms of number of stakeholders, most respondents estimate that they work on a regular basis with 10 - maximum 20 stakeholders. The majority of respondents considered stakeholders only the main suppliers, which limits the company's business approach. An important consequence could be the loss of valuable market opportunities (by ignoring potential stakeholders) and prolonging the scaling phase of the business. An interesting and singular response comes from a respondent who has a much broader perspective: *'I see the organization as a "cooperative" where I manage the parents' funds to give something to their*

children. *It's like a community that puts resources in and I manage them - that's how we built it, that's how we operate*" (educational services). On the other hand there are also respondents who deliberately reduce their number of stakeholders by choosing to work with very few key suppliers, and thus controlling the quality of the service: *"On the domestic market we have greatly reduced our collaborations with large tour operators and kept the maximum of 3-4 that we collaborate with"* (tourism agency).

Organizations prefer to develop long-term collaboration with some stakeholders and one-time or project-based collaboration with others. Therefore, the usefulness of a relationship marketing system for managing interactions with stakeholders is necessary to streamline processes. This becomes obvious given the way organizations currently manage stakeholder interactions: most mentioned non-specialized tools such as email, WhatsApp, Zoom, Skype, Google Drive.

Regarding the *second research objective (b) to explore what type of customer relationship management strategies are preferred*:

When it comes to the prevailing customer relationship strategy, industry type and customers' needs will heavily influence organizations' choices: in the construction industry the focus is on customer acquisition, in the IT&C industry the focus is on customer development by trying to sell additional services/products on top of the basic offering, while in educational services – the focus is on retention by keeping existing customers over a longer period of time. The ways in which companies collect information about customers include: direct and continuous communication with them, regular follow-up, paying attention to discussions between customers or between customers and employees and - less often - feedback questionnaires. Most respondents consider the standard forms of collecting customers feedback ineffective and prefer a rather empirical solution - through direct communication and observation - to find out what customers want and how they can serve them better.

In terms of how SMEs measure customer satisfaction, we note that only a few have standardized procedure and systems in place to track this indicator. Most rely either on spontaneous feedback received from customers or on subjective evaluation based on one-to-one discussions. In this respect, CRM systems could be useful as they can support companies by facilitating the customer review process which can then be integrated into reports and analysis.

*The third research objective was (c) to identify the technical solutions used by organizations to implement customer relations strategies*:

Regarding the technical solutions used for CRM activities, we divided the respondents into two categories: a) organizations that do not use CRM software - either because they do not have or they have but for various reasons do not use it, and b) organizations that have and currently use such software.

a) organisations that do not use CRM software:

The most commonly cited reasons for not using CRM software are:

- Lack of trust: *'mistrust that's a big issue, really... to let a software control your business, control it, monitor it. Especially because that's where the money is, pricing has to be very accurate'* (printing services).
- Malfunctioning: *"We wanted to buy a CRM, but it didn't work. The supplier wasn't able to make a functional software. We made a partial payment, we tried to use it and when it didn't work we stopped running it. Initially they promised to develop a customized software for our business. They came, we met, they showed us what they could do. I didn't have a demo to see how the software works but they told me they will customize it to our company's needs. I told them what my needs were and after a few months of designing - or whatever they did – the software didn't work"* (construction materials distributor).

- The software is too complicated: *"We don't use it much because it requires a lot of data. It's a lot of data entry, it's too complex and it asks me for too much data. It's good for large companies, but it makes us uncomfortable. We would need someone who only does data-entry, with all the data it asks us for"* (travel agency).
- With new updates, the software becomes too complex: *"Any CRM platform has become more complicated as time has gone by. Monday example is the best because Monday made a huge push two or three years ago on marketing, attracted many customers and it was superb. As time has gone on, new features were added, more and more and ultimately the platform became too complicated to use it. Now I wouldn't use it if I had to take it all over again"* (marketing agency).
- A major business partner (supplier) uses CRM software: *"We don't have our own CRM software, but our main supplier XXX has such a software. For example, they have a software where they record all the customers who asked for quotations and then transferred them to the dealers. The software allowed them to follow the sales process of the transferred customers and they called them to evaluate the satisfaction with us, with the dealers"* (construction materials dealer).
- They have a limited customer base and manage customer relationships with simpler tools (Microsoft, Google) *"Maybe if I had a larger volume of customers, but at our volume we do well with what we have"* (construction materials distributor); *"we don't want to do it in an automated way because we don't have that many. Our customers don't leave all at once, like in charter "* (travel agency).
- Lack of information: *"We didn't know about the existence of such software solutions, and the customer base is not a big one, because we operate in the B2B market"* (medical equipment).
- Negative feedback received from customers when automated solutions were used: *"we can send notifications to customers, but we don't. We prefer... well, we found - when we were sending emails with offers - that many customers unsubscribed. Of the loyal customers, many unsubscribed ... they didn't leave us, but they weren't interested in that offer* (travel agency); and *" I don't like it either, and sometimes is perceived as an aggressive thing.... When we organized a child's birthday party we collected parent's name, child's name, age, contact details. In the next year - knowing that the child's birthday was coming - we send them an invitation to the park, but most of the time it was received as an aggressive thing. So, at that point I stopped"* (adventure park).

Even if some companies do not have CRM software, they use instead other software that still collects certain customer data: inventory management software, order tracking software, booking software. To manage customer relations they use Microsoft applications - such as Excel, Access - or Google tools such as - Gmail, Drive, WhatsApp. Since most respondents have a limited customer base, it is easy for them to create a chronologically organized folder for each customer in which they save contracts, orders, invoices, email communication - anything they consider relevant: *"We use Excel, we create a file organized by year, month, customer - we have a historical record. We have customers in chronological order and in the offer database we find their offers by years and months. So, it's a centralizer and each client has a chronologically organized folder attached to it. In the folder we save the quotation, the order from the supplier, the annex to the invoice with which we sold the materials, some sketches, drawings"* (construction materials distributor).

We found out that the majority of respondents know such suppliers or are confident that - should the need arise - they will identify the most suitable suppliers. The providers mentioned are: Monday, Notion, QuickBase, Odio, Relo, HubSpot, SmartBill. It is interesting to note that

the accounting firms the respondents work with, recommend billing/CRM software developers to them.

As we mentioned previously, there are also organizations that use CRM software on a regular basis.

*The fourth research objective is (d) to analyze CRM software perception:*

All of the respondents who mentioned that they use CRM software, are in fact utilizing the operational CRM module and only one respondent stated that they also use an analytical module. It is interesting to know that although they use the operational CRM on a regular basis, they prefer to use only some functionalities. The reasons why respondents do not use it to its full capacity are varied:

- Convenience: *"I feel we use it in a rather small capacity compared to what it can offer. That's because we just focus on keeping track of potential customers, i.e. the conversations that take place with them."*(marketing agency).

- Lack of trust/information confidentiality *"It is a complete software but I have doubts, and I don't want to put everything in there. I don't record information from parents anywhere."* (educational services).

- It is not adapted to internal processes, being "as is" software, not "custom-made": *"It has some functionalities that do a relatively good job considering what we want. It could be a bit more customized. There's another thing: No software, but none, will ever be exactly what someone is looking for. No software except custom-made software."* (marketing agency).

On a scale from 1 to 10, the majority of respondents rated the level of satisfaction as 8. This can be explained either by the fact that the choice of software was not their decision but that of the major business partner *"There is room for improvement in CRM, but it is part of the group"* or by the fact that it is impossible to be a 10 as long as it is an "as-is" software: *"No as-is software is going to be exactly what someone is looking for. I think if someone gets to use 75-80% of a software, it's already magnificent, you know?"* This is even more obvious for larger companies that have clearly defined business processes: either they adapt their processes to the software - which has its drawbacks - or they buy custom-made software - which is more expensive. As a result, satisfaction levels can never be at their highest: *"The better structured the company is and the more clearly defined its processes are, the more you end up in a situation where, when you use a software, which is not customized, you either modify, alter and adapt your processes in the company so that you manage them as the software works, or you make a custom one. There's not much else you can do. Because if you change, you fix some things, but you have other disadvantages elsewhere."*

Since companies have operational CRM software, users are those who interact with customers, such as the sales and the business development team. The analytical CRM module, however, is used by the marketing team. The sales team has two distinct needs:

- Lead management: *"Tracking the sales process and moving leads from one stage to the next until they reach the final one. That's very important, to make it as simple as possible. To do so, ... they all do, but the idea is to make it a pleasant and intuitive experience. As simple as possible. As few clicks as possible, as few menus hidden and crammed in places that you need to read a book to find out where they're from.";*

- Offer management: *"It helps a lot if bidding can be managed from a CRM. That is, being able to send bids in a neat format, both web, with a link, and PDF, export and be able to send just the PDF. On the bidding side you can add attachments, files and videos"*.

Respondents who also have CRM analytics module are using it to generate reports and to query the customer database for insights.

*The fifth research objective is (e) to identify major functionalities needed for a CRM software.*

Considering operational CRM, the main recommendation concerns the possibility of customizing some functionalities of an "as-is" software: *"a mechanism to create your own forms whereby - with drag and drop - you add fields according to your needs and they are then saved in the database"*. This functionality is necessary because every company is different, even if they are in the same industry and do the same thing.

The problem is that we have a paradox: the more customized and flexible, the more complex the software becomes. Or simplicity and ease of use are major user requirements: *"The more specific it is, the more complex it gets because you need as many options as you can get. The more options you have, the more complex and the harder it is to understand how to use it"*. Therefore, developing a good software is a real "art": *"The art is in finding trade-offs, in finding balance at a given moment. Seeing how you can make it customizable, but also as simple as possible"*.

Other important functionalities a CRM software should have, are:

- Easy initial set-up and speedy adoption *"on boarding should be easy. All must be fast for customers and users. And from there we get into user interface and user experience ...it needs to be easy to use, easy to understand"*;
- Ease of use: *"In general, when I buy software I look for it to be friendly, easy to work with, to be simple and intuitive"*;
- Cloud-based (SaaS): *"To have an online account, I don't want to pay an upfront investment - server, licenses - I want to pay an acceptable annual fee"*;
- Reliable and fast maintenance: *"to have a dedicated number to call and solve the issue"*.
- Quick and easy reporting *"be able to find data quickly, not get into lots of tables, lots of intermediary steps"*;
- Scalable;
- Automatic notification mechanism;
- Allow multiple users to log in from different locations *"Be able to log-in, not just me, but everyone who needs to from anywhere"*;
- Attractive design: *"colourful, whatever, aesthetic, beautiful"*.

## 5. Conclusions and recommendations

As we have mentioned, most of the companies operate predominantly in B2B markets and have a narrow customer base, probably due to the limited resources at their disposal. Also, most are micro-enterprises with a considerable tenure in the market which helped them to know their customers very well and gives respondents a high level of confidence in their expertise and quality of decisions.

The problem is that they define stakeholders in a narrow sense, limiting themselves mostly to suppliers, which gives them a limited perspective on business development. In terms of CRM strategies, these range from acquisition (construction firms), customer development (IT&C firms) and retention (educational services firms). Most find out what customers want rather empirically, using direct communication and observation. Few firms have formalized customer satisfaction tracking measures, and they rely mostly on customers feedback and proactive one-to-one discussions.

The reasons for not using CRM software are varied: they are not trusted, they do not work, they are too complicated, they have a limited customer base and managing customer relationships is performed using simpler tools or a major business partner uses a CRM software thus taking over their responsibility.

To manage customer relations they use Microsoft applications such as Excel, Access or Google tools such as Gmail, Drive, WhatsApp or even ERP software that already collects some information about customers such as inventory management software, order tracking software,



booking software. Those who have CRM software, use it in their daily operations (operational CRM module) and only one respondent indicated using analytical CRM. The reasons why respondents do not use it to its full capacity are varied: convenience, lack of trust/confidentiality of information, not adapted to internal processes, being "as is" software, not "custom-made".

Although previous research has identified cost as the main barrier to CRM software adoption (Wei and Pardo, 2022), this reason was not mentioned by any of the respondents. There are financially affordable cloud-based solutions that have already been mentioned by some respondents. The main requested functionalities are: easy initial set-up and adoption, ease of use, cloud-based (SaaS) solution, fast and reliable maintenance, quick and easy reporting, scalable solution which allow multiple users from different locations to connect, and an attractive design.

The main problem is that respondents don't see the strategic importance of CRM software. As long as most respondents only see the operational role of CRM - which can be replaced with some success by other ERP applications they already use - the adoption rate will continue to be limited. Moreover, as CRM software has started to integrate AI, this will strengthen its strategic dimension by (Wei and Pardo, 2022): generating customers knowledge and insights, increasing operational efficiency, interacting with customers anywhere and anytime more efficiently.

Unfortunately, investments in these new versions of CRM-AI will increase and SMEs are known for their limited resources. An opportunity would be to use AI platforms across an entire ecosystem of multiple stakeholders (suppliers, intermediaries, customers) instead of investing in their own CRM-AI platform (Chatterjee et al., 2023).

Therefore, the main factor that will accelerate the adoption rate is the business-owner's attitude of the added value of such a system at strategic level. Once the leadership is convinced of the usefulness of this system, it is important to encourage and incentivize employees to use it.

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