

FREQUENT CHALLENGES IN CRM IMPLEMENTATION AND PRACTICAL SOLUTIONS FOR SMALL AND MEDIUM-SIZED ENTERPRISES

DOI: <https://doi.org/10.53486/dri2026.23>

UDC: [005.346:004.78]:334.72.012.63/.64

Ruslana DONȚU

Academy of Economic Studies of Moldova

Chisinau, Republic of Moldova

Email account: ruslana.moscaliuc@gmail.com

ORCID ID: 0009-0009-7030-9162

Abstract: *This study examines the implementation of Customer Relationship Management (CRM) systems in small and medium-sized enterprises (SMEs) and their impact on customer management, sales performance, and marketing efficiency. The main objective of the research is to identify how CRM solutions contribute to improving communication with customers, optimizing business operations, and increasing customer loyalty. The study also explores the importance of automation, employee training, and system integration in achieving successful CRM adoption within SMEs. The methodology is based on qualitative analysis, including case studies, secondary data analysis, and the evaluation of CRM implementation practices in different SMEs. The research investigates the challenges companies face during CRM integration and the strategies used to improve operational efficiency and customer relationship management. Particular attention is given to the role of digital tools in organizing customer information, tracking interactions, and supporting decision-making processes.*

The findings indicate that effective CRM implementation leads to better customer satisfaction, improved lead management, increased sales productivity, and stronger long-term relationships with clients. In addition, the results show that SMEs that invest in staff training and automation achieve higher operational performance and more efficient marketing activities. The study concludes that CRM systems represent an essential strategic tool for SMEs seeking sustainable growth, competitive advantage, and improved business performance in a dynamic market environment.

Key words: CRM, Digitalization, Customer Relationship Management, Data Centralization, Automation.

JEL: M31, O33, C83

Introduction

Implementing a CRM system within SMEs brings significant benefits; however, the process is often accompanied by a range of challenges that can affect the final outcomes. Among the most common are the lack of a clear strategy, employee resistance to change, poor data quality, difficult integration with other systems, underutilization of functionalities, insufficient training, and ineffective performance monitoring. Without a well-defined vision, a CRM system risks becoming merely a technical tool with no real impact on the business. Therefore, it is essential that the implementation be guided by concrete objectives aligned with the company's sales and marketing strategy.

Another major challenge is team adoption of the system. Employees may perceive the CRM as an additional task, leading to superficial or incorrect usage. The solution lies in practical training, clear communication of the benefits, and involving the team throughout the implementation process. At the same time, companies must pay close attention to the quality of the data entered into the system, as incomplete or inaccurate information compromises analysis and future decision-making. Standardizing data collection and update processes thus becomes essential.

Integrating the CRM with other digital tools (such as email marketing platforms, ERP systems, and sales platforms) represents another common difficulty. Choosing a compatible solution and conducting phased testing can help prevent technical bottlenecks. Furthermore, many SMEs fail to use the full potential of the system, limiting themselves to basic functionalities. It is therefore recommended to configure automated workflows and make use of analytical reports for the continuous optimization of business processes.

CRM system usage guidelines remain fundamental to successful implementation, as they provide a clear framework for centralizing customer data, improving customer experience, and increasing customer loyalty. At the same time, they contribute to streamlining sales and marketing activities and supporting data-driven decision-making. By combining operational best practices with practical solutions for each of these challenges, companies can maximize the value of CRM technology, adapt quickly to market dynamics, and strengthen their competitive advantage.

The implementation of a CRM system is a complex, long-term project with real risks involved. Even when the technology is successfully installed, the outcomes may still be disappointing due to common implementation mistakes. Below are the seven classic errors frequently observed in practice, each accompanied by recommendations that should be incorporated into the company's internal guidelines to ensure successful implementation.

1. CRM Implemented by Programmers Instead of Sales Specialists

In many companies, CRM implementation becomes a technical project managed almost exclusively by the IT department. On paper, this seems logical: those who build the software should also implement it. In practice, however, this approach creates a significant gap between the system's capabilities and the actual needs of the sales team — a gap that can compromise the entire project.

The core issue is that when decisions regarding the CRM structure, workflows, and priorities are made primarily from a programming perspective, the result is technically correct IT solutions that are poorly adapted to the way people actually sell. The outcome: unnecessary functionalities, complicated interfaces, procedures that slow down workflows, low user adoption, and a failure to achieve the expected business value.

Common causes:

-Organizational predisposition: management automatically delegates the project to the IT department, viewing software development as purely a technical matter.

-Lack of user consultation: sales representatives are involved only in formal stages and do not actively contribute to process design.

-Poor communication: different terminology and unspoken expectations lead to incorrect interpretations in the specifications.

-“Build-first” approach: priority is given to delivering code rather than validating commercial usefulness.

How this blocks implementation success:

- Low adoption rate: salespeople avoid the system, continue using spreadsheets or personal notes, and data becomes inaccurate.
- Duplicate work and errors: processes designed without practical business insight create repetitive tasks and operational mistakes.
- Weak ROI: significant investments in development fail to generate sales growth because the functionalities do not support commercial decision-making.
- Delays and additional costs: repeated reconfigurations, scope changes, and ad-hoc developments increase both the budget and implementation timeline.

Warning signs that the project is at risk:

- Frequent requests for “fixes” from the sales team after launch.
- Complex reports remain unused, while mandatory fields are ignored.
- A decline in the number of activities recorded in the CRM compared to unofficial tracking methods.
- Ongoing friction between IT and sales regarding priorities.

Practical solutions: Mixed Project Team

- Establish a project team that includes representatives from sales, IT, operations, and management.

- Appoint a product owner from the sales department responsible for functional priorities and deliverable approval.

2. Customer and Transaction Data Is Not Recorded

In practice, one of the most frequent and damaging CRM implementation flaws is the data gap: customer records remain incomplete, transactions are not properly logged, and information stays fragmented across personal notes or Excel files. Essentially, the system exists, but its "heart" — the data — is not functioning. Without accurate data, the CRM cannot support decision-making, automation, or personalized customer relationships.

Common causes

- Perceived time cost: managers and sales agents see filling in customer records as an administrative task that takes time away from selling.
- Poorly designed forms: long cards, irrelevant or redundant fields discourage complete data entry.
- Lack of automation: data that could be captured automatically (emails, calls, web forms) is entered manually.
- Weak organizational culture: there are no clear rules, responsibilities, or incentives/sanctions for proper data entry.
- Missing feedback loop: users do not immediately see the practical value of entered data (reports, qualified leads, segmentation).

How it blocks project success

- Incorrect analysis: decisions based on incomplete data lead to wrong strategies (poor targeting, inefficient forecasting).
- Ineffective automation: triggers and campaigns fail because they lack the necessary data to function properly.
- Lost opportunities: follow-ups are delayed, clients remain unattended, or receive irrelevant communication.
- Low adoption: management loses trust in the CRM, and users return to parallel tools (Excel, notes).
- Hidden costs: data re-entry and cleanup consume additional time and resources.

Clear signs that data is not properly recorded

- High proportion of incomplete customer records or inactive accounts.
- Mismatch between real activity reported by managers and CRM records.
- Low-performing campaigns due to incorrect segmentation.
- Frequent billing or follow-up errors caused by missing transaction history.

Step-by-step implementation (mini roadmap for instructions)

- Phase 1: Define minimum required fields and implement validation rules.
- Phase 2: Add automated capture for emails/calls and web form integration.
- Phase 3: Run a pilot with a sales team, monitor data quality, and collect feedback.
- Phase 4: Scale up, provide full training, monitor KPIs, and make periodic adjustments.

3. Excessively Long Development (10+ months)

Problem

Custom CRM projects often extend over long periods and exceed budgets, delaying benefits and generating additional costs.

How it blocks success

Delayed launch reduces trust, increases expenses, and makes ongoing business changes incompatible with the system under development.

Practical solution

Launch an MVP (Minimum Viable Product) quickly using a standard cloud solution; measure clear results within the first 3 months, then prioritize customizations in stages based on proven impact.

4. Lack of Training Programs and Materials

Problem

There are no structured materials, rules, or responsible trainers; new employees learn in an unstructured way, consuming colleagues’ time.

How it blocks success

Slow and incorrect adoption leads to poor-quality data and reduces the perceived value of the CRM.

Practical solution

Create a standard onboarding package: 3 short videos (introduction, main workflow, daily tasks) plus a 7-step checklist for the first week. A designated super-user should be responsible for delivery.

5. CRM Used Only as a Database (Like Excel)

Problem

The CRM becomes a passive registry without active processes for increasing sales.

How it blocks success

Without clear use cases and scenarios, the system does not influence conversion, retention, or upselling; lack of ROI leads to abandonment.

Practical solution

Define one priority use case (e.g., increasing follow-up rate within 14 days) and configure dedicated automations and reports for it. Measure results and expand gradually.

6. Incompatibility with Accounting and Other Systems

Problem

Lack of integration leads to duplicate work, errors, and information loss (e.g., accounting system integration issues).

How it blocks success

Parallel workflows discourage CRM usage, increase administrative time, and create data inconsistencies.

Practical solution

Conduct a preliminary technical audit: list required fields and synchronization frequency, then implement a standard connector or middleware for automated synchronization with clear reconciliation rules.

7. Recommended Operational Elements for Internal Procedures

Problem

Lack of a structured activity list leads to unfocused work: wasted time, unclear priorities, and high variability in productivity.

How it blocks success

Without a shared plan, monitoring, and motivation alignment, performance becomes unpredictable; KPIs fluctuate, pipelines weaken, and management cannot intervene effectively.

Practical solution

Define a standardized daily plan with 4–6 measurable core actions (e.g., 25 outbound calls, 8 follow-ups, 2 scheduled meetings, 2 sent offers). A daily checklist is completed in the CRM, and performance directly influences variable bonuses.

Table 1. Monitoring structure — example table (daily monitoring and responsibilities)

Indicator / Activity	Daily target	Source / CRM tool	Responsible	Alert if not achieved
Outbound calls	25	Call log CRM	Manager	>30% below target
Follow-up (email/task)	8	Task list CRM	Manager	>40% below target
Offers sent	2	Documents CRM	Manager	0 offers/day
New lead sign-ups	3	Lead form / integrations	Marketing	<1 lead/day
Client card updates	100% of interactions	Card activity	Manager	any interaction not recorded
Pipeline total value	—	Pipeline dashboard	Head of Sales	drop >10% wk.
Invoices issued	—	ERP/CRM integration	Finance	daily discrepancies

Source: Author’s elaboration.

Rapid implementation:

- Configure KPI dashboard in CRM (1 week).
- Publish checklists and SLAs in the knowledge base (2 days).
- Run a 4-week monitoring pilot, adjust processes and regulations.

A clear set of operational procedures — daily planning, automated reporting, short coordination rituals, and control policies — transforms the CRM from a storage space into a sales engine. The disciplined implementation of these elements ensures data quality, real adoption, and predictability of commercial performance.

Conclusions

Implementing a CRM system represents, in essence, an organizational change just as much as it is a technological investment. The conclusions presented in this material—referring to the need for a daily activity plan, automated reporting and monitoring, short coordination meetings, as well as clear regulations and sanctions—are not merely operational best practices, but fundamental requirements for transforming CRM from a simple data repository into a real engine for generating commercial value.

Three central ideas emerge from the proposed analysis. First, operational discipline. Without standardized and verifiable procedures, the sales team's activity remains uncoordinated, and the data in the CRM becomes incomplete or inaccurate. A clear daily plan, with measurable actions and verification tools, reduces performance variability and enables rapid intervention from management. Second, reporting infrastructure and analysis. Automated reports and real-time dashboards are essential for identifying deviations, allocating resources, and making tactical decisions. They transform the data entered into the CRM into useful insights, which are essential for optimizing conversions, planning the sales pipeline, and evaluating campaign efficiency.

Third, decision rhythm and a culture of accountability. Short daily routines and weekly meetings ensure team alignment on immediate objectives, while a clear set of rules, together with proportional consequences for non-compliance, enforces the discipline necessary to maintain data quality and desired behaviors.

The effectiveness of these measures does not depend exclusively on technology, but rather on their integration into a coherent managerial framework: the designation of responsible roles (super-users, commercial product owner), transparent communication of expectations, and linking performance indicators to motivation systems. In practice, the most successful CRM projects combine appropriate technological solutions with clear processes, systematic training, and data governance mechanisms. These conclusions are also supported by best practices documented in the professional literature. Studies and reports from management and technology consulting—including analyses on data monitoring, change management, and software adoption in companies—confirm that CRM projects with well-defined and measurable operational processes have a significantly higher probability of delivering ROI. General business recommendations (MVP phase, piloting, iterations, clear ownership roles) are frequently mentioned in professional guides from research and consulting firms and align with practical market experience.

In conclusion, transforming CRM into a strategic tool requires consistency: setting rules, enforcing them, monitoring results, and continuously adjusting based on data. Adopting the proposed model—combining daily planning, automated reporting, structured work rhythms, and a clear regulatory framework—offers the most direct path toward improving commercial performance, increasing data quality, and maximizing the value of the technology investment. Through rigorous implementation and active monitoring, CRM ceases to be an administrative burden and becomes a concrete instrument for growth and predictability for the business.

References

1. Affinity.co, n.d. End-user adoption challenges in CRM. [online] Available at: <https://www.affinity.co> [Accessed 01–05 May 2026]
2. Almotairi, M., 2008. CRM success factors taxonomy. In: European and Mediterranean Conference on Information Systems, 2008.
3. Bbdboom.com, n.d. Organizational and cultural challenges in CRM adoption. [online] Available at: <https://www.bbdboom.com> [Accessed 01–05 May 2026]
4. Bose, R., 2002. Customer Relationship Management: key components for IT success. *Industrial Management & Data Systems*, 102(2), p.89.
5. Business Insider, 2025. Zurich insurance uses AI in CRM to enhance customer experience. [online] Available at: <https://www.businessinsider.com/zurich-insurance-ai-customer-relationship-management-crm-system-helps-agents-2025-5> [Accessed 01–05 May 2026]
6. CIO Insight, n.d. The time and cost of implementing CRM software. [online] Available at: <https://www.cio.com> [Accessed 01–05 May 2026]
7. CRM.org, 2025. CRM statistics and market trends. [online] Available at: <https://crm.org/crmland/crm-statistics> [Accessed 01–05 May 2026]
8. DemandSage, 2024. CRM statistics: Adoption and benefits for small and medium businesses. [online] Available at: <https://www.demandsage.com/crm-statistics> [Accessed 01–05 May 2026]
9. Forrester Research, 2024. Process standardization and team performance. [online] Available at: <https://go.forrester.com/research/> [Accessed 01–05 May 2026]
10. Forrester Research, 2025. Conversational and omnichannel CRM platforms. [online] Available at: <https://go.forrester.com/research/> [Accessed 01–05 May 2026]
11. Goldenberg, B.J., 2002. CRM automation. London: Prentice Hall Professional.
12. Harvard Business Review, 2022. Customer data platforms: Bridging the CRM gap. [online] Available at: <https://hbr.org> [Accessed 01–05 May 2026]
13. Harvard Business Review, 2023. Agile teams and adaptability. [online] Available at: <https://hbr.org/2023/05/agile-teams> [Accessed 01–05 May 2026]
14. Ko, E., Sook, H.K., Myungsoo, K. and Ji, Y.W., 2008. Organizational characteristics and the CRM adoption process. *Journal of Business Research*, 61(1), p.70.
15. McKinsey & Company, 2023. How AI is transforming customer relationships. [online] Available at: <https://www.mckinsey.com> [Accessed 01–05 May 2026]
16. Payne, A., 2006. Handbook of CRM: achieving excellence in customer management. London: Routledge.
17. Xu, Y., Yen, D.C., Lin, B. and Chou, D.C., 2002. Adopting customer relationship management technology. *Industrial Management & Data Systems*, 102(8), pp.442–452.