

Key Success Factors and Challenges of CRM Implementation in the Digital Era: A Literature Review

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ABSTRACT

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The rapid development of digital technology has transformed the way organizations manage relationships with their customers, making Customer Relationship Management (CRM) an essential strategy in today's competitive business environment. This study aims to review and synthesize previous literature on CRM implementation in the digital era. Using a qualitative descriptive approach through a literature review, relevant studies were collected from academic sources and analyzed thematically. The findings were grouped into three major dimensions: organizational factors, technological factors, and customer-centric factors. The review shows that successful CRM implementation depends on strong leadership support, employee readiness, effective cross-functional coordination, adequate technological infrastructure, and a clear focus on customer value. The study also identifies several recurring challenges, including resistance to change, legacy system integration, data management complexity, high implementation costs, and limited technical expertise. These findings indicate that CRM should be understood not merely as a technological tool, but as a strategic approach that integrates people, processes, and technology. Overall, effective CRM implementation in the digital era requires a holistic and adaptive strategy to strengthen customer relationships and achieve sustainable competitive advantage.

1. INTRODUCTION

The rapid development of digital technology has significantly transformed the way companies interact with their customers. In today's highly competitive and constantly changing business environment, organizations are required to adjust their strategies in managing customer relationships in order to remain relevant and competitive. Customer Relationship Management (CRM) has therefore become an important strategic approach that enables companies to better understand customer needs, improve communication, and create long-term value through stronger customer engagement and loyalty [1], [2], [4]. The digital era has shifted the nature of customer-business interaction. Through the growth of social media, mobile technology, e-commerce platforms, and data-driven systems, customers now have greater access to information, more choices, and stronger influence over the relationship they build with organizations. As a result, companies can no longer rely on traditional relationship management approaches alone. Instead, they must adopt CRM strategies that are more integrated, adaptive, and customer-centered, supported by digital technology and data-based decision-making [3], [4], [5].

Previous studies have shown that CRM implementation is influenced by multiple dimensions, including organizational readiness, technological capability, and the ability of firms to place customer needs at the center of their strategy. In addition, CRM implementation in the digital era is often challenged by resistance to change, difficulties in integrating legacy systems, data management complexity, and limited human and technological resources [10], [14], [22], [23], [25]. These findings indicate that CRM should not be understood merely as a technological tool, but as a comprehensive business strategy involving people, processes, and technology [8], [11], [12]. This paper aims to review and synthesize previous studies on CRM implementation in the digital era. The contribution of this study is not limited to summarizing earlier literature; rather, it organizes prior findings into three interrelated dimensions—organizational factors, technological factors, and customer-centric factors—and identifies the major challenges affecting CRM implementation in digital business environments. By doing so, this paper provides a clearer conceptual understanding of the factors that support successful CRM implementation and offers insights for organizations seeking to strengthen customer relationships in the digital age.

2 LITERATURE REVIEW

2.1 Definition of CRM

Customer Relationship Management (CRM) is a complex business strategy that focuses on managing and strengthening interactions with customers. This strategy includes a comprehensive integration of internal processes, external networks, and information technology to provide added value to targeted customers[6]. CRM is also an important concept underlying the

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company's efforts to maintain a competitive advantage in the midst of changing and demand-oriented market conditions, by emphasising the importance of understanding customer needs and building strong relationships with them[7]. In addition, CRM (customer relationship management) is a strategy that manages customer relationships to create value through the use of data, technology, and business process integration. This concept evolved along with the increasing complexity of customer data, demanding cross-functional collaboration to increase business value. CRM focuses on building long-term relationships with customers through acquisition, retention, and personalised services. However, challenges such as complex data management and the need for customer relationship orientation remain concerns in its implementation[8]. On the other hand, some people interpret CRM as an abbreviation of Customer Relationship Marketing. However, there is also a group that argues that not all customers want a long-term relationship with a provider, so they drop the word 'relationship' and prefer the more concise term Customer Management. On the other hand, there are those who prefer the term Relationship Marketing. Regardless of the differences in terms, in general CRM is a customer-orientated business practice[9]. In paper [10] CRM is a strategy that manages a company's interaction with customers to increase their value and loyalty, especially in the ICT sector. In the ICT industry, CRM plays a role in building trust and long-term communication, which supports customer satisfaction and loyalty. In addition, effective CRM implementation provides a competitive advantage with personalised services and has a positive impact on business growth. CRM implementation involves analysing customers, building relationships, and managing the customer lifecycle to match business strategies[8].

CRM became widely recognised in the late 1990s, driven by changes in customer interactions due to the development of the internet and the increasing demand for CRM technology. However, many organisations implemented it without understanding its complexities, such as the lack of a clear strategy and organisational readiness. When implemented well, CRM can provide a significant competitive advantage. In the future, CRM is expected to continue to grow and be applied in various fields, including human resources. Successful CRM implementation depends on the right strategy, clear project planning, and effective cross-functional teams[11].

CRM is not a new concept, but it is now easier to implement thanks to advances in software technology. Originating from sales force automation (SFA), CRM focuses on customer retention by managing long-term relationships, not just transactions. It collects and analyses customer data to create comprehensive profiles, predict buying patterns, and tailor marketing strategies. Many companies have successfully implemented CRM. Ritz-Carlton recorded guest preferences for more personalised service. Bank One reduces small business customer churn with dedicated account managers. Dell lets customers customise their computers online and monitor orders in real-time. CRM helps companies increase customer loyalty and create a more personalised experience[12].

2.2 CRM in a Digital Environment

The pervasiveness of digital technologies, such as social media, mobile devices, and predictive analytics, has changed the way customers and businesses interact, creating both challenges and opportunities for organisations looking to build strong and lasting relationships with their customers. Digital transformation gives customers greater access to information, choice and the ability to influence their interactions with businesses, ultimately shifting the balance of power towards customers[4]. To maintain a competitive advantage in this dynamic environment, companies must proactively adapt their CRM strategies, utilising digital technologies to create a more personalised customer experience that can be reached through a variety of different channels. The ever-evolving changes in customer expectations and the increasing complexity of the digital ecosystem require organisations to adopt a holistic and integrated CRM approach, which seamlessly aligns people, processes and technology to deliver exceptional customer experiences and achieve long-term business success[3].

Companies must face a complex and constantly evolving digital environment, characterised by increasing digital technology, changing customer behaviour, and increasing competitive pressures. As technological developments continue to change the business world, companies must adjust their customer relationship strategies to stay relevant and competitive[13][4]. Effective CRM implementation in the digital age relies on identifying and prioritising key factors that can help organisations in their transformation efforts. Existing literature reveals several important factors that contribute to the successful implementation of CRM in the digital age, including organisational, technological, and customer-focused factors[14][3]. A successful CRM implementation also involves three interrelated dimensions, namely: first, the human factor, which includes the skills and mindset of employees; second, the optimisation of internal processes to provide better service to customers; and third, the technology implementation strategy that supports CRM implementation[4].

The digital age has brought major changes in the way businesses interact with their customers. The development of information technology has enabled companies to utilise electronic customer relationship management (e-CRM) to improve service quality and customer satisfaction[15]. One of the main advantages of e-CRM is its ability to track customer interactions and store data in a centralised database, which allows sales, marketing and customer service departments to work together more efficiently[1][16]. This centralised customer data management system allows businesses to understand customer needs and preferences more comprehensively, thereby providing a more personalised and tailored experience[1][17].

In addition, e-CRM also allows companies to utilise various technological advancements to improve customer relationships. For example, mobile CRM integration has facilitated real-time customer interactions, while the adoption of electronic funds transfer has simplified financial transactions, both of which contribute to a smoother and more efficient customer experience. The rapid growth of e-commerce further confirms the importance of e-CRM, as companies must now face the evolving digital landscape and proactively develop effective strategies to engage and retain customers in this ever-changing business environment, where customer expectations and behaviours are constantly changing[15][17].

To effectively implement CRM in the digital age, businesses must take a holistic approach that includes the integration of technology, business processes and human resources. As companies embark on digital transformation, they must carefully consider the impact on the workforce and ensure that employees have the necessary skills and resources to adapt to these changes[3]. Thus,

companies can ensure that the implementation of e-CRM not only increases customer satisfaction, but also minimises the negative impact on their employees.

One example of CRM implementation in the digital era is the use of e-CRM or Electronic Customer Relationship Management in digital banking. E-CRM can be defined as a strategy that combines hardware, software, applications, processes, and management practices to improve customer service and maintain relationships with customers. The ultimate goal is to maximise sales to existing customers and opportunities through digital communication technologies. An e-CRM system consists of various elements, including operational databases, websites, customer service platforms, email, and marketing through social media[18]. The successful implementation of e-CRM in digital banking relies heavily on a strategic approach, effective integration of digital tools, and a strong focus on customer engagement to build long-term relationships and ensure business continuity[19]. Technology integration in CRM systems is key to creating competitive advantage. In the banking sector, technology plays a role in improving interactions with customers and understanding their needs, which is crucial for maintaining long-term relationships[20]. In addition, another example of the application of CRM in the digital era can be found in the implementation of CRM in B2B companies. In this case, the importance of utilising social media to increase customer engagement, build brand awareness, and communication between businesses and stakeholders is highly emphasised. However, companies also need to be careful in using public social media for CRM purposes and be more selective in filtering the digital data collected, in order to fit their CRM strategy[21].

2.3 Effective CRM Implementation Strategy

In the effective implementation of CRM, there are several influencing factors, including the following:

1. Organisational Factors

The successful implementation of CRM in the digital age depends on the establishment of a strong organisational foundation, which includes a customer-focused culture, solid change management processes, and visionary leadership committed to driving digital transformation[22][23]. One of the key success factors is the alignment of organisational priorities, objectives and performance measures with the larger CRM strategy, ensuring that all employees are empowered and incentivised to deliver an exceptional customer experience[23]. On the other hand, organisational factors such as management support, cross-functional communication and employee training are critical to ensuring the long-term sustainability of the CRM strategy[22]. In research [10], the successful implementation of CRM depends on employee training, because trained employees can manage data and interact with customers more effectively, thus creating a customer-oriented company culture. However, there are several challenges in its implementation, such as employee resistance to change, difficulties in system integration, and large investments in technology and training. Overcoming these challenges is key to ensuring the effectiveness of CRM strategies. Research shows that support and commitment from top management, the establishment of systematic cross-functional communication, and the implementation of mandatory customer loyalty training programmes are crucial organisational elements to drive the successful adoption of CRM[24][4]. In addition, the intensive use of management support can have both positive and negative impacts, and organisational transparency has been identified as a tool to increase success and mitigate negative impacts throughout the CRM journey[23].

2. Technology Factor

The implementation of a successful CRM strategy requires consideration of both organisational and technological factors[23]. Effective CRM implementation in the digital age also requires a solid technological infrastructure to support seamless customer data integration, key process automation, and personalised and omnichannel customer experience delivery[14]. Companies must invest in modern, cloud-based CRM platforms that can adapt to evolving customer needs and emerging digital trends, while also building a data-driven culture that leverages analytics and insights to continuously improve and optimise the customer experience[4]. In fact, the adoption of new technologies will not be successful without the support of organisational leaders and employees. In addition, upskilling and professional retraining in the industry is essential for the digital transformation in organisations to run smoothly[14].

3. Customer-Centric Factors

A customer-centric approach is central to any effective CRM strategy. This means that organisations must shift their attention away from internal operations and focus more on understanding and prioritising customer needs, preferences and experiences[4][23]. This customer-oriented mindset needs to be applied throughout the organisation, from planning to execution, so that all decisions and actions deliver exceptional value to customers. As explained by[4] 'CRM must be viewed as a strategy, because it involves human aspects, technology, and processes when organisations decide to implement it.' For CRM to succeed, there needs to be a comprehensive approach that combines organisational readiness, technological capabilities, and efficient internal processes[23].

2.4 Challenges in Implementing CRM in the Digital Age

Digital transformation has ushered in a new era for business, characterised by rapid change in the customer landscape, ever-increasing expectations, multiple channels of interaction, and an abundance of data. As companies strive to cope with this dynamic environment, the implementation of an effective Customer Relationship Management (CRM) strategy is critical[4]. However, the successful adoption and implementation of CRM in the digital age faces various challenges. One of them is integration with older systems, where organisations must ensure that the new CRM solution can run smoothly with existing systems, so as to avoid operational disruptions that can lead to inefficiency and resistance from employees. Data management is also a big challenge because CRM handles large and sensitive volumes of customer data, so it is important to maintain data accuracy and security so as not to create risks that can damage the effectiveness of the system. In addition, the shortage of IT experts is another obstacle because

many organisations find it difficult to find skilled professionals to manage and optimise CRM systems. Furthermore, it is important to align the CRM strategy with the overall business strategy. Without this alignment, organisations risk wasting resources and missing opportunities. Finally, the management of ecosystems involving various stakeholders is also very important, because all parties must work towards the same goal for the implementation of CRM to be successful[25].

3 RESEARCH METHODS

This study uses a qualitative descriptive approach through a literature review to examine the implementation of Customer Relationship Management (CRM) in the digital era. The literature review method was chosen because it enables the researcher to collect, evaluate, and synthesize previous studies relevant to the topic in a systematic manner. The data sources used in this study were obtained from scientific journals, books, conference proceedings, and research publications related to CRM, e-CRM, digital transformation, and customer-oriented business strategies [15], [16], [17], [18]. The literature search was conducted through academic databases and search engines such as Google Scholar and ScienceDirect using keywords related to the main topic, including “Customer Relationship Management,” “CRM in the digital era,” “electronic CRM,” and “digital customer relationship management.” The search process focused on publications relevant to the implementation of CRM, the role of digital technology in customer management, and the organizational and technological factors influencing CRM success.

After the literature had been collected, the selected studies were reviewed and filtered based on their relevance to the research topic. The selection considered the suitability of the topic, the clarity of the discussion on CRM implementation, and the contribution of each study to understanding CRM in digital environments. The selected literature was then examined in depth to identify its main arguments, findings, and areas of emphasis. The synthesis of the reviewed literature was conducted using a thematic approach. The findings from previous studies were grouped into three main categories: organizational factors, technological factors, and customer-centric factors. In addition, the reviewed studies were compared and interpreted to identify recurring patterns, differences in emphasis, and common implementation challenges. This thematic synthesis was then used as the basis for developing the discussion and conclusions of this paper. Therefore, the final analysis presented in this study is not a simple summary of individual sources, but an interpretation of the major themes emerging from the reviewed literature.



Figure 1. Stages of the Literature Review Process Used in This Study

Figure 1 illustrates the stages of the literature review process employed in this study. The process begins with the identification and formulation of the research problem, followed by a systematic search for relevant literature from academic sources. After the literature was collected, the studies were screened and selected based on their relevance to the research topic. The selected studies were then examined in depth to identify their main findings, arguments, and areas of focus. Furthermore, the extracted information was organized and categorized into major themes to facilitate analysis. In the final stage, the reviewed studies were synthesized thematically into organizational, technological, and customer-centric dimensions, which served as the basis for the discussion and conclusions of this study. To clarify the literature synthesis process, the selected studies were summarized in Table 1 based on their context, main focus, key findings, and thematic contribution to this review.

Table 1. Synthesis of Previous Studies on CRM Implementation in the Digital Era

Study	Context / Sector	Main Focus	Key Findings / Insights	Thematic Category	Contribution to This Review
Boulding et al. (2005) [8]	General CRM	CRM as a strategic approach	CRM creates value through the integration of data, technology, and business processes; it supports acquisition, retention, and personalized service, but also faces challenges in data management and relationship orientation.	Conceptual foundation / Customer-centric	Provides the conceptual basis for understanding CRM as more than a technical tool.

Kotorov (2003) [11]	General CRM	Strategic lessons and future directions of CRM	Successful CRM implementation depends on a clear strategy, proper project planning, organizational readiness, and effective cross-functional teams.	Organizational factor	Supports the argument that CRM success requires strategic and organizational alignment.
Chen and Popovich (1999) [12]	General CRM / Business practice	People, process, and technology in CRM	CRM improves customer loyalty and personalization through customer data analysis and coordinated processes; examples such as Ritz-Carlton, Dell, and Bank One show practical implementation.	Integrated CRM perspective	Strengthens the people-process-technology perspective in CRM implementation.
Tekin (2013) [4]	General CRM / Digital environment	Critical success factors for CRM strategy	CRM success is influenced by human aspects, internal process optimization, and technology strategy; digital transformation also shifts power toward customers.	Organizational, technological, and customer-centric factors	Serves as a key reference for the three-dimensional synthesis used in this paper.
Faishal and Ambarwati (2022) [10]	ICT service companies	CRM implementation in ICT firms	CRM in ICT firms enhances customer value and loyalty; employee training is essential, while resistance to change, system integration, and investment remain key obstacles.	Organizational factor / Implementation challenges	Provides sector-specific evidence on training and implementation barriers.
Wilson et al. (2010) [22]	CRM systems	Factors for CRM success	Management support, cross-functional communication, and employee training are critical for long-term CRM success.	Organizational factor	Supports the importance of organizational readiness and internal coordination.
Rahimi (2009) [23]	General CRM	Critical success factor framework	CRM requires alignment between organizational priorities, objectives, and performance measures; organizational readiness, technology, and efficient processes must work together.	Organizational and integrated framework	Strengthens the analytical framework linking strategy, process, and technology.
Adnan et al. (2021) [15]	E-CRM / Service quality	The role of e-CRM in improving service quality	E-CRM improves service quality and supports more efficient coordination through centralized customer data.	Technological factor / Customer-centric factor	Demonstrates how digital CRM tools improve customer service quality.
Adlin (2019) [16]	E-CRM adoption	Electronic CRM adoption and trends	E-CRM supports customer interaction tracking and centralized databases, enabling better cooperation across sales, marketing, and service functions.	Technological factor	Supports the role of centralized digital systems in CRM implementation.
Kumar, Mokha, and Pattnaik (2022) [18]	Banking industry	E-CRM, customer experience, and customer satisfaction	In digital banking, e-CRM integrates hardware, software, applications, processes, and management practices to improve customer service and maintain relationships.	Technological and customer-centric factors	Provides evidence from banking on how e-CRM improves customer experience.
P. Sciences (2018) [19]	Digital banking in Indonesia	Customer engagement through e-CRM	Successful e-CRM in banking depends on strategic digital tool integration and strong customer engagement to support continuity and long-term relationships.	Customer-centric and technological factors	Reinforces the importance of engagement in digital CRM implementation.

C. R. P. B. et al. [20]	Banking industry	CRM for satisfaction, loyalty, and competitive advantage	Technology integration in CRM improves customer understanding and supports long-term relationships and competitive advantage in banking.	Technological factor / Customer-centric factor	Adds sectoral evidence that CRM technology contributes to competitive advantage.
F. Authors (2015) [21]	B2B companies	CRM in the digital age in B2B firms	Social media can increase customer engagement, brand awareness, and communication with stakeholders; however, firms must be selective in filtering public digital data for CRM purposes.	Customer-centric factor / Technological factor	Shows the relevance of CRM in B2B settings and the importance of digital data selection.
Naji and Gunduz (2024) [14]	Digital transformation context	Technological readiness and transformation maturity	Effective CRM requires strong infrastructure, cloud-based platforms, data analytics, and employee upskilling to support digital transformation.	Technological factor	Strengthens the technology dimension in the synthesis framework.
Sittrop and Crosthwaite (2021) [25]	CRM systems / Change management case	Risks and challenges in CRM implementation	Major challenges include legacy system integration, data accuracy and security, lack of IT experts, weak strategic alignment, and stakeholder coordination issues.	Implementation challenges	Provides direct support for the paper's challenge analysis.

Table 1 shows that the reviewed literature can be synthesized into three major dimensions: organizational, technological, and customer-centric factors, while also highlighting recurring implementation challenges. This synthesis demonstrates that successful CRM implementation in the digital era depends on the alignment of people, processes, technology, and customer-oriented strategy.

4 RESULTS AND DISCUSSIONS

The reviewed literature shows that CRM implementation in the digital era should be understood as a strategic and integrated process rather than as the adoption of a technological system alone. CRM has evolved from a tool for managing customer data into a broader business approach that combines data, organizational processes, and technology to support long-term customer relationships. In digital business environments, companies are expected to respond more quickly to customer needs, personalize their services, and maintain consistent interaction across multiple communication channels [8], [11], [12], [17]. This indicates that the effectiveness of CRM depends on the extent to which organizations are able to align customer strategy with digital capability. One of the main findings of this review is that successful CRM implementation is strongly influenced by organizational factors. Previous studies consistently highlight the importance of leadership support, employee training, cross-functional communication, and a customer-oriented organizational culture [10], [22], [23], [24]. These factors are essential because CRM implementation often requires significant organizational change, including adjustments in workflow, coordination between departments, and employee readiness to use new systems. In this regard, CRM should be viewed not only as a technical initiative, but also as a change management process that requires strategic commitment from top management and operational readiness at multiple organizational levels.

The literature also shows that technological capability plays a central role in determining CRM success in the digital era. A strong CRM system requires integrated databases, automation features, data analytics, and digital platforms that support real-time interaction with customers [4], [14], [15], [16]. The adoption of e-CRM, cloud-based systems, and omnichannel communication has enabled companies to improve service quality and better understand customer behavior. However, the reviewed studies also suggest that technology alone is insufficient. The benefits of CRM technology can only be fully realized when organizations have the necessary skills, clear implementation strategies, and the ability to translate data into meaningful customer insights [14], [18], [19]. Another important result of this review is the strong emphasis on customer-centric factors. In the digital era, customers are more informed, more connected, and more selective in their interactions with firms. As a result, CRM strategies must be designed to create value from the customer's perspective rather than focusing solely on internal efficiency [4], [20], [21], [23]. The literature indicates that organizations with effective CRM practices tend to prioritize customer needs, personalize communication, and use customer data to improve satisfaction and loyalty. This confirms that customer orientation is not an additional element of CRM, but a core principle that guides the use of organizational and technological resources.

The synthesis also reveals that the success of CRM implementation depends on the interaction among organizational, technological, and customer-centric dimensions. These three dimensions are closely connected and cannot be treated separately. For example, advanced CRM technology may fail to produce positive outcomes if employees are not adequately trained or if the organization does not adopt a customer-focused culture. Similarly, a strong customer orientation may not be effectively implemented without reliable technological infrastructure and coordinated internal processes. Therefore, the literature suggests that CRM success in the digital era results from strategic alignment among people, processes, and technology [3], [4], [14], [23]. Despite

its strategic benefits, CRM implementation in the digital era also faces several recurring challenges. The reviewed studies identify resistance to change, integration problems with legacy systems, data complexity, high implementation costs, and limited technical expertise as major barriers [10], [14], [22], [25]. These challenges show that organizations often struggle not because they lack CRM tools, but because they face difficulties in integrating those tools into existing business structures and capabilities. In addition, the increasing volume of customer data raises important concerns related to data accuracy, privacy, and security. For this reason, CRM implementation requires not only technological investment, but also careful planning, organizational support, and continuous improvement. Overall, the findings of this review demonstrate that CRM implementation in the digital era is most effective when organizations adopt a holistic approach. Rather than emphasizing only one dimension, companies need to integrate organizational readiness, technological strength, and customer-centered strategy into a unified framework. This review therefore highlights that the long-term value of CRM lies in its ability to support sustainable customer relationships, improve service quality, and strengthen competitive advantage in increasingly dynamic digital markets.

5 CONCLUSION

The implementation of Customer Relationship Management (CRM) in the digital era has become increasingly important as organizations face rapid technological change, evolving customer expectations, and growing competitive pressure. Based on the reviewed literature, CRM should be understood not only as a tool for managing customer information, but as a strategic approach that integrates organizational readiness, technological capability, and customer-oriented thinking to create long-term value. This study contributes to the CRM literature by synthesizing previous research into three interrelated dimensions: organizational factors, technological factors, and customer-centric factors. The review also identifies several major challenges in CRM implementation, including resistance to change, system integration difficulties, data management complexity, limited expertise, and resource constraints. These findings show that successful CRM implementation depends on the ability of organizations to align people, processes, and technology in a coherent and adaptive way. In conclusion, the success of CRM implementation in the digital era is determined by more than technological adoption alone. Organizations that are able to combine strong leadership, appropriate digital infrastructure, and a clear focus on customer value are more likely to achieve better customer experiences, stronger loyalty, and sustainable competitive advantage. Future research may extend this review by focusing on specific industries or by conducting empirical studies to examine how CRM strategies are implemented in different organizational contexts.

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