



CRM ADOPTION IN SMES: WHAT'S WRONG? AN EMPIRICAL PERSPECTIVE ON KEY ACTORS

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Abstract

Purpose. Although the strategic nature of CRM is recognised, its adoption process is often hindered by various obstacles. This study examines the complexities of CRM adoption among SMEs, emphasising emerging tensions among stakeholders.

Design/methodology/approach. A case study is adopted to examine the CRM adoption in a firm operating in equipment rental. Data were collected through interviews, observation and secondary data. An integrate empirical and theoretical insights to understand emerging tensions is abductively developed.

Findings. The study suggests that CRM adoption in SMEs unfolds interactively between three key actors: the user, the vendor and the consulting. Rather than hindering, frictions and tensions act as mechanisms for learning and adapting resources. This led the firm to incorporate CRM-like approach without adopting a software.

Practical implications. The findings emphasise how CRM adoption should be evaluated from more than a technological standpoint. The study suggests how managers could benefit from emerging frictions and tensions to avoid costly mistakes.

Originality of the study. The IMP analytical lens is employed to analyse how CRM adoption unfolds in SMEs, shifting from a linear perspective to a dynamic and interactive one. It highlights the crucial role of vendors and consultants interaction in this process.

1. Introduction

Customer Relationship Management (CRM) systems are widely recognised as a strategic tool for enhancing customer relationships, streamlining business operations and improving firm performance (Payne & Frow, 2005; Buttle & Maklan, 2019; Suoniemi et al., 2022). Over the past three decades, the adoption of CRM has been subject to extensive study, with most research conceptualising it as a linear, stage-based process that progresses from evaluation to adoption and routinisation (Cruz-Jesus et al., 2019; Prior et al., 2024). This dominant view portrays CRM as a technological solution whose success depends primarily on the user commitment. When adopting CRM, firms often face various challenges, including technological, organisational and inter-organisational issues, which may impede the adoption process and the realisation of expected outcomes (Nguyen & Waring, 2013; Suoniemi et al., 2022).

CRM adoption is particularly demanding for small and medium-sized enterprises (SMEs). SMEs often lack the necessary financial, human and technical resources to manage complex IT projects, and therefore rely heavily on external support and vendor expertise (Alshawi et al., 2011; Al-Homery et al., 2023). As CRM adoption falls under the umbrella of firms' digitalisation, it is worth noting that Italian SMEs tend to lag behind in this practice, often hindered by weaker capabilities and lower investment compared to their European counterparts (European Investment Bank, 2020). In Italy, the challenge of adopting CRM systems is further compounded by a structural digitalisation gap: while around 53% of large firms have implemented such systems, this figure drops to just 19.2% for SMEs (ISTAT, 2023). Furthermore, two-thirds of adopters experience ongoing integration issues and low success rates, with fewer than 30% achieving the expected outcomes (Osservatoriocrm.it, 2024; Farhan et al., 2018). These difficulties encourage SMEs to involve external actors in the CRM adoption process attempting to improve their ability to overcome the challenges. Therefore, Adopting CRM in SMEs may involve several external partners, whose contributions are essential for full adoption to be achieved. Consequently, it is important to understand whether CRM adoption outcomes depend not only on technical and managerial factors within the adopting firm, but also on the support provided by the various stakeholders involved in the adoption process (Suoniemi et al., 2022).

To capture the interactive dynamics of CRM adoption, this study employs the Industrial Marketing and Purchasing (IMP) perspective as an analytical lens (Perna, 2013; Baraldi & Perna, 2014). The study uses the IMP concepts of frictions and tensions to analyse the interactions between actors while the adoption process unfolds. Despite the growing recognition of the importance of the CRM adoption, little attention has been given

to how frictions and tensions between actors emerge during the adoption process (Möller & Halinen, 2022). This study addresses this gap by examining the CRM adoption case of ALPHA, an Italian SME operating in the equipment rental and construction services sector. Accordingly, the study is guided by the following research question: How does CRM adoption unfold through network actors' interactions?

The study takes a qualitative, longitudinal case study approach (Yin, 2018; Eisenhardt & Graebner, 2007) to examine ALPHA's CRM adoption journey over a period of more than two years. Data were collected through semi-structured interviews, participant observation and secondary sources (Patton, 2014; Yin, 2018). The analysis took an abductive approach (Dubois & Gadde, 2002), iterating between empirical evidence and adopting the IMP framework as an analytical lens in order to identify emerging frictions, tensions and patterns of interaction.

The study makes three main contributions to the CRM literature. Firstly, the interaction processes identify three key actors — the SME, the vendor and the consulting firm — whose interplay shapes the trajectory of CRM adoption. Secondly, it demonstrates the non-linear, recursive nature of CRM adoption by showing how SMEs may opt for adaptive solutions instead of full-scale implementation. Thirdly, it demonstrates that frictions and tensions in CRM adoption processes act as learning mechanisms that play a positive role in leading the firm to avoiding a potentially misguided investment for the software.

The paper proceeds as follows: Section 2 reviews the literature on CRM and explains why the IMP perspective was used. Section 3 describes the methodology. Section 4 presents the findings. Section 5 discusses the implications. Section 6 concludes with a summary and directions for future research.

2. Literature background

2.1 Conceptualising CRM

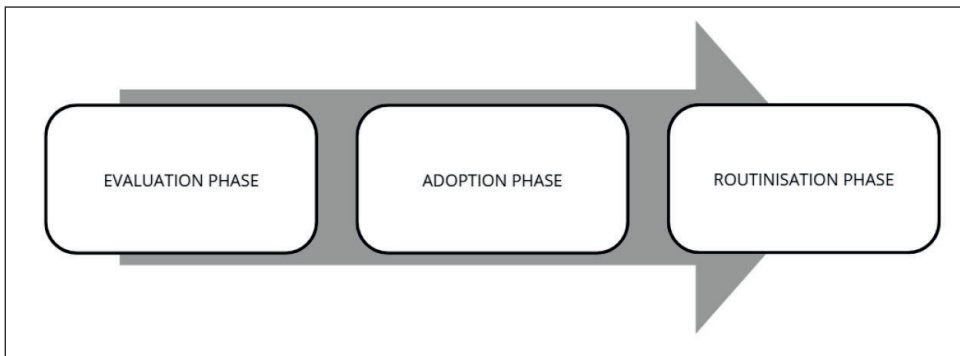
The ambiguous conceptualisation of CRM makes it difficult for it to be adopted, as the lack of a stable and shared meaning makes it hard to define clear objectives and align technological and organisational changes (Perna & Baraldi, 2014). Despite its widespread awareness, CRM remains conceptually fragmented, with more than 100 definitions identified in the literature (Perna & Baraldi, 2014). This heterogeneity reflects the dual nature of CRM as both a strategic business approach and a technological tool (Payne & Frow, 2005; Buttle, 2004), as well as the coexistence of technology-driven and managerial-relational interpretations (Iriana & Buttle, 2007; Cruz-Je-

sus et al., 2019). CRM has evolved from a software to a cross-functional strategic approach that integrates marketing, operations and information management (Parvatiyar & Sheth, 2001; Payne & Frow, 2005), thereby linking customer engagement with organisational knowledge and value creation (Buttle, 2004; Payne & Frow, 2016). From this broader perspective, CRM is typically characterised by four interconnected dimensions: strategic, operational, collaborative and analytical (Iriana & Buttle, 2007; Khodakarami & Chan, 2014). The strategic dimension aligns relationship initiatives with long-term objectives (Payne & Frow, 2005; Buttle & Maklan, 2019; Verhoef & Lemon, 2013), the operational dimension automates customer-facing processes (Chen & Popovich, 2003; Rahimi & Günlü, 2016; Payne & Frow, 2016), the collaborative dimension coordinates internal and external stakeholders (Iriana & Buttle, 2007; Reinartz et al., 2004; Nguyen & Mutum, 2012; Choudhury & Harrigan, 2014), and the analytical dimension generates data-driven insights (Khodakarami & Chan, 2014; Garrido-Moreno et al., 2020; Payne & Frow, 2005; Chatterjee et al., 2021). Together, these dimensions present CRM as an integrated managerial approach rather than merely a technological tool (Buttle & Maklan, 2019; Prior et al., 2024), which highlights the inherent complexity of its adoption (Perna & Baraldi, 2014).

2.2 The CRM Adoption Process

CRM adoption is traditionally conceptualised as a structured, staged process through which organisations integrate new systems, routines, and relational practices (Alshawi et al., 2011). It typically progresses through phases of evaluation, adoption and routinisation (Cruz-Jesus et al., 2019), moving from initial assessment to implementation and eventual embedding in everyday operations (see Figure 1).

Fig.1 CRM adoption stages



Source: Author elaboration based on Cruz-Jesus et al. 2019

Previous studies have identified various technological, organisational and environmental factors that influence this process. From a technological perspective, successful adoption hinges on data quality, system compatibility, and integration with existing infrastructures (Chen & Popovich, 2003; Cruz-Jesus et al., 2019). Organisational enablers include leadership commitment, employee engagement and cross-departmental coordination (Lawson-Body et al., 2011; Pedron & Caldeira, 2011), while competition, customer expectations and vendor relationships are among the external pressures that also influence adoption trajectories (Kubina & Lendel, 2012; Alghamdi, 2023). However, research has also recognised that CRM adoption involves multiple organisational and external actors with differing goals and interpretations that shape implementation outcomes (Nguyen & Waring, 2013; Suoniemi et al., 2022; Khattak et al., 2022). Aligning these heterogeneous perspectives is essential for achieving a shared vision of CRM's purpose and value (Baraldi et al., 2013; Buttle & Maklan, 2019). Given CRM's multidimensional nature, encompassing strategic, operational, collaborative, and analytical dimensions (Iriana & Buttle, 2007; Khodakarami & Chan, 2014), it cannot be reduced to a mere technological investment. Rather, it must be understood as a managerial process requiring the integration of technological, organisational, and relational capabilities (Payne & Frow, 2005; Buttle & Maklan, 2019). Overall, CRM adoption emerges as a complex, socially embedded process that unfolds over time through the alignment of diverse organisational elements. Therefore, an interaction-oriented perspective is particularly relevant for understanding how CRM adoption develops beyond a purely linear or internally driven view.

2.3 A processual and interactive perspective on technology adoption

As CRM adoption can be seen as a process that typically involves multiple organisational and external actors whose expectations and interpretations influence the adoption process, this study uses the Industrial Marketing and Purchasing (IMP) perspective as an analytical lens. IMP studies approach marketing and technological development from an interaction-based perspective, emphasising how processes unfold through relationships among interdependent actors and resources (Håkansson & Snehota, 1995; Håkansson & Waluszewski, 2007; Prenkert et al., 2022). Therefore, it is particularly well-suited to examining how complex technologies are adopted, rather than being implemented as predefined solutions (Turnbull et al., 1996; Woo et al., 2004; Metcalf et al., 1992). Within this perspective, frictions are viewed as misalignments that occur at the interfaces between

heterogeneous resources, infrastructures and organisational units, when efforts are made to combine or rework them (Håkansson & Waluszewski, 2002; Baraldi et al., 2012). Tensions arise when parties involved in the adoption process have different goals or interpretations of the ongoing change (Hoholm & Olsen, 2012; La Rocca et al., 2016). Rather than signalling failure, these mechanisms usually trigger negotiated adaptation processes that shape technological adoption (Håkansson & Waluszewski, 2011; Perna & Baraldi, 2014).

3. Methodology

The study adopts a qualitative approach to gain an in-depth understanding of complex phenomena, collecting data without altering the context (Yin, 2018). Using a qualitative methodology provides a more comprehensive and in-depth understanding of the phenomenon, thereby clarifying and extending existing analytical insights (Voss, 2010; Kähkönen & Tenkanen, 2010). This method allows interaction patterns in CRM adoption processes to be captured (Aaboen et al., 2012). The methodology is also informed by the IMP perspective of interactive studies that enhance the use of qualitative, information-rich case studies (La Rocca et al., 2017). The study is based on a longitudinal case study to provide a process-oriented perspective and support an understanding of the interactions between actors, as well as the emergence of frictions between technological and organisational resources during the CRM adoption process (Langley et al., 2013).

The case study was selected for its revelatory potential as it involved a medium-sized firm engaged in a CRM implementation initiative. This offered a unique opportunity to observe the emergence of frictions and tensions during the process (Coviello & Joseph, 2012).

3.1 Case selection, context and data collection

The focal firm is an SME that operates within the construction and production plant maintenance service provider and rental equipment industry. Based in central Italy, the firm operates within the country's borders. It is extending its presence through subsidiaries in other regions. So far, ten subsidiaries have been established. In 2022, the company achieved a turnover of almost 26 million euros, employed over 150 people directly and indirectly, and provided services to around 2,000 customers. The group is owned by a single shareholder and entrepreneur who intends to utilise digital technology to improve the firm's marketing and sales processes.

The university research team had prior academic relationships with AL-

PHA, providing preferential access to data and key informants throughout the CRM initiative. This enabled the team to observe the project over time and document its development from the initial stages to the operational rollout, while maintaining analytical independence. This approach yielded a richer and more detailed understanding of the phenomenon under investigation (Yin, 2018). Data collection unfolded through a snowballing sampling process whereby informants were selected based on their relationship with the focal firm (Biernacki & Waldorf, 1981; Marcus et al., 2017). All informants were directly involved in the CRM adoption process. A total of 21 semi-structured interviews, totalling 665 minutes, were conducted with key informants in the network (Siggelkow, 2007). Three key actors were selected because they represent the core interaction units in the CRM adoption process, in which the main resource frictions and actors' tensions emerged. Although other actors (such as customers or other technology partners) were part of the broader network, they were less involved in CRM adoption. Consequently, their interactions did not significantly influence the focal dynamics analysed in this study and were therefore excluded from the core analytical framework.

Table.1 Interviews' design

| n. | Data | Informant | Firm | Support | Length (mins) |
|-----------|-------------|-----------------------------|-------------|----------------|----------------------|
| 1 | 01/12/2023 | Marketing Executive | ALPHA | Video + notes | 40 |
| 2 | 06/12/2023 | Marketing Executive | ALPHA | Video + notes | 35 |
| 3 | 08/01/2024 | Marketing employee | BETA | Video + notes | 15 |
| 4 | 08/01/2024 | Marketing employee | BETA | Video + notes | 15 |
| 5 | 12/01/2024 | Management Engineering | ALPHA | Video + notes | 35 |
| 6 | 02/02/2024 | Sales director | ALPHA | Video + notes | 20 |
| 7 | 26/02/2024 | Sales director & IT manager | BETA | Video + notes | 25 |
| 8 | 10/05/2024 | Marketing Executive | ALPHA | Video + Notes | 40 |
| 9 | 15/05/2024 | Sales Director | ALPHA | Video + Notes | 25 |
| 10 | 18/05/2024 | Management Engineer | ALPHA | Video + Notes | 30 |
| 11 | 22/05/2024 | Sales Director & Technician | BETA | Video + Notes | 35 |
| 12 | 25/05/2024 | Marketing Employee | BETA | Video + Notes | 20 |
| 13 | 28/05/2024 | Consultant | Consulting | Video + Notes | 40 |
| 14 | 30/05/2024 | CEO | ALPHA | Video + Notes | 45 |
| 15 | 11/10/2024 | Consultant | Consulting | Video + Notes | 40 |
| 16 | 18/11/2024 | Management Engineer | ALPHA | Video + Notes | 30 |

| | | | | | |
|----|------------|------------------------------------|------------------------------|-------------------|----|
| 17 | 21/01/2025 | Key Customer – Procurement Manager | ALPHA Customer | In person + notes | 35 |
| 18 | 18/03/2025 | Key Customer – Operations Manager | ALPHA Customer | In person + notes | 30 |
| 19 | 22/06/2025 | Technical Manager | Secondary Technology Partner | In person + notes | 40 |
| 20 | 14/07/2025 | CRM Integration Specialist | Secondary Technology Partner | In person + notes | 25 |
| 21 | 15/07/2025 | Entrepreneur (peer of ALPHA CEO) | External Firm | In person + notes | 45 |

Tot. 665 mins

Source: Author's elaboration.

Each interview was transcribed and translated into English before being analysed by each author. The results were then discussed jointly to minimise subjectivity in the interpretation of the data and implications of the study (Eisenhardt & Graebner, 2007). The coding process involved a two-step procedure. First, open coding was used to identify instances of friction and tension in the interview transcripts. Second, axial coding was applied to cluster these instances into higher-order categories (e.g. technological misalignment, strategic conflict, and relational resistance), which were then refined by comparing them with theoretical constructs. Furthermore, analysis of the findings highlighted a processual perspective (Langley, 1999; Pettigrew, 1992).

3.2 Data analysis

The analysis of the collected data was conducted using an abductive approach (Dubois & Gadde, 2002; Baraldi et al., 2012; Thompson, 2022). This approach enabled the identification of emerging dimensions of resource-related frictions, including technological, organisational and infrastructural misalignments, which were observed during the attempted adoption of CRM. This iterative process involves seamless navigation between theoretical frameworks and empirical information, enabling constant refinement of theoretical emphasis and data collection strategies (Dubois & Gadde, 2002; Dubois & Gibbert, 2010). The data were primarily extracted from interviews and organised in a structured Excel database, supporting the systematic mapping of informants, codes, and emerging themes to develop the study's findings and theoretical and managerial implications. Furthermore, a processual perspective was adopted in analysing the findings (Langley, 1999; Pettigrew, 1992). This processual lens was employed to reconstruct the chronological unfolding of the CRM adoption attempt, emphasise piv-

otal events and contextualise the tensions between actors, thereby offering a comprehensive view of the interactive CRM adoption process.

4. Findings

4.1 Case description

ALPHA is a medium-sized construction equipment and services firm. The firm's sales structure includes a sales director and two key account managers, as well as 12 subsidiaries in Italy. The study also considers two additional key actors in the process: BETA, a medium-sized software company with approximately €10 million in revenue and 60 employees, and a consulting firm specialized in B2B marketing and sales for SMEs. BETA has collaborated with ALPHA for several years. However, when the CRM adoption process began and initial implementation challenges emerged, ALPHA decided to involve the consultancy firm to manage BETA's technical decisions integrating strategic and commercial perspectives.

4.2 Inception (before 2021): early tensions and misalignments

The CRM adoption journey at ALPHA was initially driven by external influence rather than an internal assessment of operational needs. During a business event, the entrepreneur was introduced to the concept of CRM by a peer who had had a positive experience with it, facilitated by a business consultant. Inspired by this discussion, the entrepreneur envisaged using CRM to enhance sales processes and strengthen the firm's customer orientation.

"The CRM project was born out of a need, to be able to manage the company's growth project." (Marketing Executive, ALPHA)

Despite this enthusiasm, ALPHA had already been working with BETA, a long-standing technology provider which had struggled to deliver a viable digital sales solution. Prior to engaging the consultancy firm, ALPHA had attempted to digitise its sales operations independently, but these efforts had been fragmented and largely unsuccessful. This led to the decision to involve an external marketing consultant who had been recommended by a peer of the entrepreneur as an expert in B2B marketing and sales transformation.

However, tensions arose immediately when the consultant started evaluating ALPHA's digitalisation efforts. He swiftly identified significant

shortcomings in ALPHA's current digital strategy and recognised that numerous unresolved challenges had been overlooked.

"The entrepreneur already collaborates with a software house that has been serving the company for a long time, but they were facing problems that they could not solve and for which they had already invested." (Consultant)

This reveals initial friction between technological investments and organisational use. Although resources had been acquired, their potential remained unrealised due to a lack of coordinated organisational adaptation.

One of the consultant's primary observations was the lack of a structured internal analysis prior to the initiation of the CRM project. They noted that ALPHA lacked the necessary internal expertise and strategic roadmap for CRM adoption.

"No one had the skills or had ever bothered about it because internally there had never been any analysis of the company's needs and how it works." (Consultant)

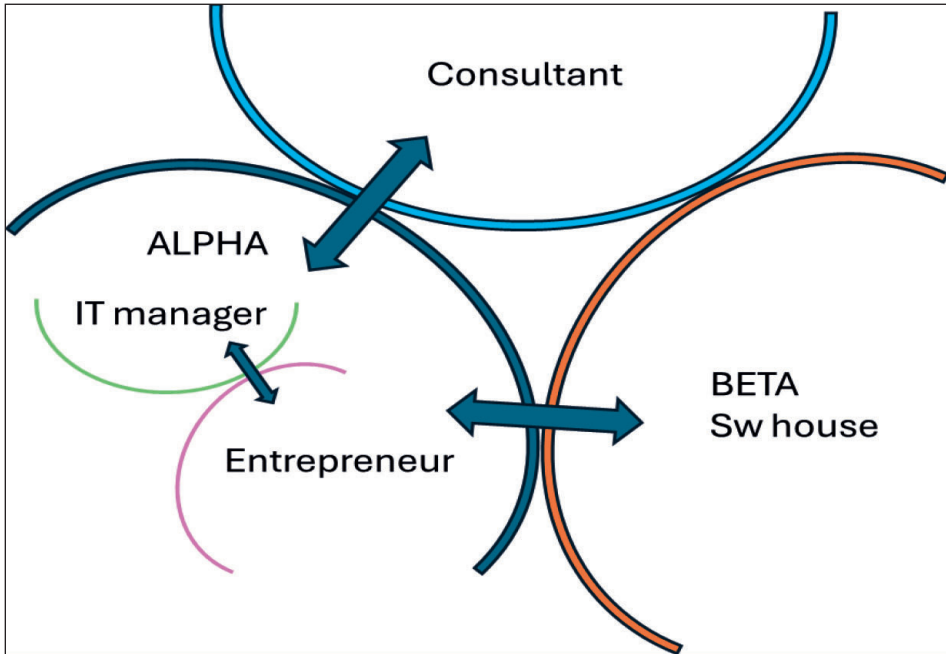
As the consultant introduced a structured marketing approach, tensions escalated, particularly with BETA, ALPHA's trusted software provider. The consultant's presence and methodical approach challenged BETA's long-standing role within ALPHA's digital transformation strategy.

"The fact that I arrived and brought more culture to these aspects, creating a marketing infrastructure from scratch, meant that the company became more aware and began to question the solutions that the software house was trying to propose." (Consultant)

Tensions escalated as the consultant introduced a structured marketing approach, particularly with BETA, ALPHA's long-standing trusted software provider. The consultant's presence and systematic approach threatened BETA's established role in ALPHA's digital transformation strategy.

"I represented the company's vision and not my own; I only helped the company clarify its vision and, as far as possible, realise it." (Consultant)

Fig.2 Inception phase actors' interfaces and relationships



Source: Authors' elaboration.

Figure key: Arrows determine a direct relationship. Blue shield is the consultant firm, Orange shield is the BETA SW house, Dark green shield is ALPHA. Within ALPHA the two actors that were involved in the inception phase.

4.3 Evaluation (2020 - 2021): Unfolding Tensions and Strategic Misalignments Inception

The evaluation phase at ALPHA was shaped by difficulties between internal needs and external constraints. Initially, the consultant and the IT manager conducted an internal assessment of the marketing and sales processes and identified the need for the structured adoption of CRM. A key tension emerged when the consultant recommended hiring a marketing executive to oversee the project. After some initial reluctance, the entrepreneur agreed, and by late 2021, the marketing executive had joined ALPHA.

The newly formed marketing team then conducted a structured evaluation of multiple CRM solutions, assessing vendors through demonstrations and user reviews.

"We had identified a whole series of criteria on which to evaluate CRM software, did demos with five providers, and integrated user reviews from Captterra." (Marketing Executive, ALPHA)

However, this structured process was abruptly derailed when the entrepreneur handed complete control to BETA, the long-standing IT provider, thereby sidelining the independent evaluation.

BETA's initial proposal of an open-source CRM system immediately raised concerns due to several critical issues. These included a lack of compatibility with ALPHA's ERP system, an absence of a prior needs assessment and a tendency to focus on selling the CRM system as a standardised product rather than addressing ALPHA's specific organisational challenges. This incompatibility created friction at the interface between the CRM and existing infrastructures.

"They didn't analyse our needs before suggesting a CRM but tried to sell us something as if we were at the greengrocer." (Marketing Executive, ALPHA)

Following the rejection of the first proposal by ALPHA, BETA backtracked by proposing a second, higher-end CRM from a leading provider. However, this led to further tensions between the parties involved: BETA pushed for minimal customisation, promoting a standardised solution, while ALPHA demanded a tailored CRM aligned with its sales structure and processes. ALPHA, on the other hand, demanded a CRM tailored to its sales structure and processes.

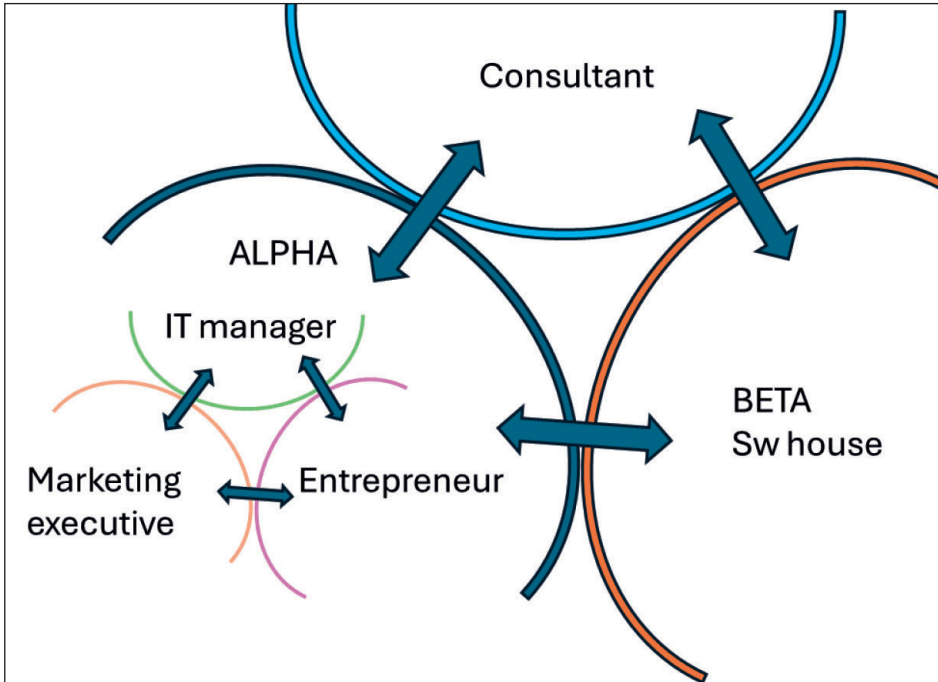
"I don't want compilation systems. I want everything at the click of a mouse." (Marketing Executive, ALPHA)

Attempting to counteract BETA's influence, the consultant mapped out ALPHA's sales process and CRM requirements in detail. This reduced BETA's ability to shape the direction of the project. However, this intensified tensions, with BETA resisting further collaboration.

Amidst growing uncertainty from the entrepreneur, ALPHA ultimately halted the CRM adoption process. Instead, the company chose to integrate CRM functionalities into its existing ERP system, thus avoiding the risk of investing in incompatible software.

"The company decided to put the project on standby until the software house would understand what it was asking for." (Consultant)

Fig.3 Evaluation phase actors' interfaces and relationships



Source: Authors' elaboration.

Figure key: Arrows determine a direct relationship. Blue shield is the consultant firm, Orange shield is the BETA SW house, Dark green shield is ALPHA. Within ALPHA the three actors that were involved in the evaluation phase.

4.4 Adopting a CRM Without a CRM (2021-2022): Tensions Driving an Alternative Path

Following two years of evaluation and ongoing tensions between ALPHA, the consultants, and the long-standing software provider BETA, the CRM adoption project reached an unexpected turning point. The entrepreneur, growing increasingly wary of the risks of failure and misaligned expectations, hesitated to proceed. Internal resistance, coupled with ongoing tensions with BETA, prompted ALPHA to abandon the idea of adopting an external CRM system. Instead, the firm opted to embed CRM functionalities into its existing ERP system and develop a CRM approach through alternative activities.

The decision not to adopt CRM was not a straightforward rejection, but rather a strategic adaptation triggered by several issues — technical limi-

tations, organisational resistance and misalignment between vendors and users. The consultant summarised the decision:

“The basic scenario was to use the ERP because the sales team already used it for invoicing and quotations. It already contained all master fields and could be expanded. Instead of CRM software, a reporting system was implemented to guide sales activities based on customer data, managed by the marketing team.” (Consultant)

Although ALPHA rejected an external CRM solution, the company recognised the need for a structured approach to customer relationship management. The revised approach integrated key CRM functions into the ERP system. These functions include tracking customer interactions, such as calls, emails, and meetings; monitoring the sales pipeline from initial requests to contract closure; and improving data analytics in order to support decision-making and customer targeting.

New difficulties emerged. Despite this transition, internal resistance and coordination challenges arose, especially during the ERP adaptation.

Integrating CRM-like features required cross-departmental collaboration, which increased workloads and responsibilities, generated resistance among sales representatives who feared additional administrative burdens, and called for alignment between marketing, IT, and sales in order to ensure that the system matched operational needs.

Initially, structured data analysis meetings were introduced, but adoption was slow.

“When sales reps were available, they spent a day searching for data and discussing with marketing and sales management.” (ALPHA IT manager)

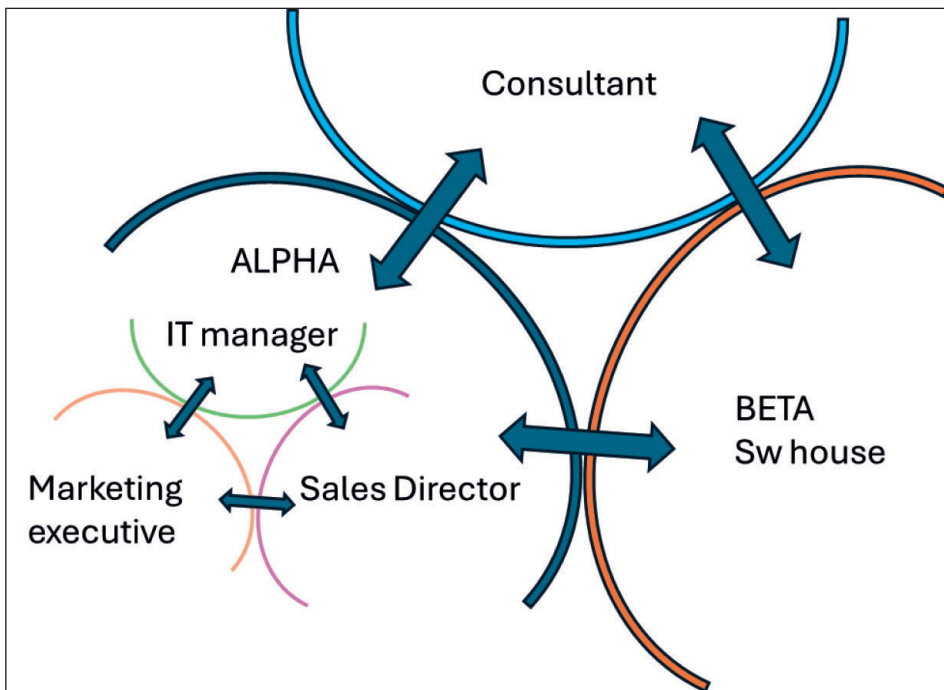
Gradually, the process gained traction through training initiatives and consultancy guidance, ensuring alignment between strategic objectives and operational execution.

However, a changing power dynamic has brought new tensions with BETA. Although ALPHA distanced itself from adopting a CRM system through BETA, the software provider was not entirely excluded. The ERP system remained dependent on the IT team at BETA for data extraction and integration, necessitating continued collaboration. However, tensions persisted as BETA’s reduced influence over ALPHA’s digital strategy weakened its control. The IT manager played a pivotal role in managing this balance, ensuring ALPHA’s strategic independence while maintaining a functional working relationship with BETA.

Rather than shutting down the project, ALPHA’s decision pivoted on the misalignment between the proposed CRM product and the firm’s mar-

keting and sales requirements, ending with a different approach to CRM adoption. The standardised solution promoted by BETA did not fit ALPHA's existing sales structure, reporting logic or operational processes. In particular, the proposed CRM required configurations and routines that did not fit with the marketing and IT departments' vision according to firm's customer management. The rise of those issues brought the firm in deciding to adapt the ERP system to perform basic CRM functions. Adapting it, required organisational adjustments and new routines. Technological issues also persisted as ERP modifications remained dependent on BETA. However, embedding selected CRM functionalities into the existing ERP system represented a negotiated adaptation rather than a failure. Rather than conforming to a predefined CRM model, ALPHA adapted its digitalisation strategy to better align with its organisational structure and marketing-sales approach.

Fig.4 Adoption phase actors' interfaces and relationships



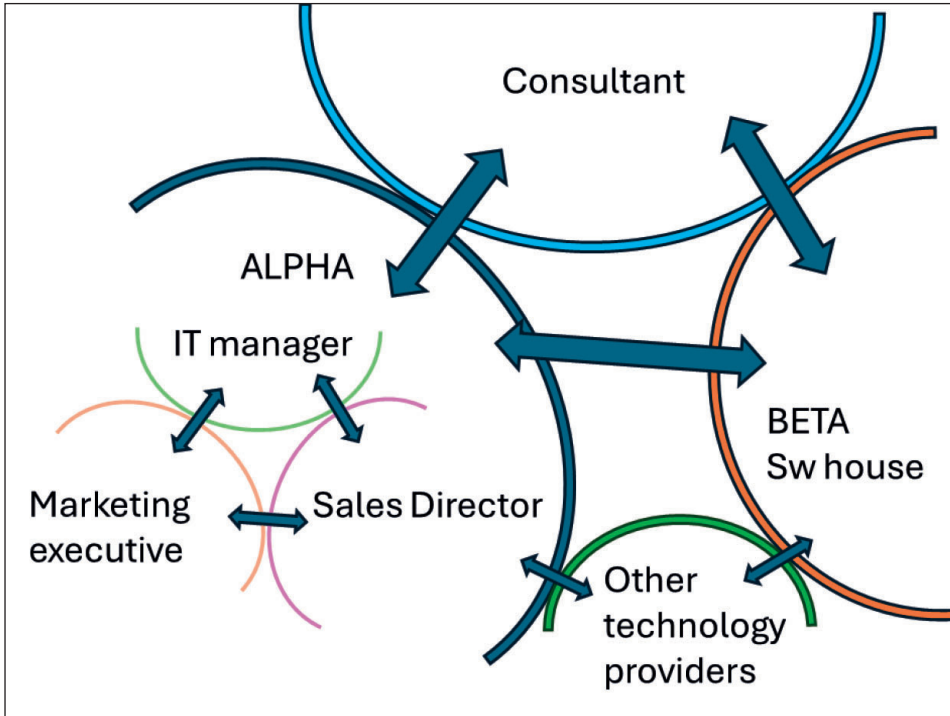
Source: Authors' elaboration.

Figure key: Arrows determine a direct relationship. Blue shield is the consultant firm, Orange shield is the BETA SW house, Dark green shield is ALPHA. Within ALPHA the three actors that were involved in the adoption phase.

4.5 Routinisation (2023-)

By the end of 2023, CRM-related practices had become embedded in ALPHA's daily operations. Monthly meetings between the marketing department and sales representatives provided structured sales reports, improving coordination between departments and strengthening data-driven decision-making processes. This process enhanced customer targeting and refined ALPHA's sales strategies, contributing to a gradual cultural shift across its subsidiaries. However, despite these advancements, frictions persisted, particularly regarding the limitations of the ERP in fully integrating CRM-like functionalities. Slow progress in incorporating call tracking and email data created tensions and raised concerns about incomplete customer insights. This sparked renewed discussions on whether to continue modifying the ERP or adopt a dedicated CRM tool instead. Further challenges emerged as ALPHA had to coordinate with multiple technology providers to implement additional features. Despite past resistance, BETA was now required to collaborate with external vendors, leading to organisational frictions and misalignments. Although the consultant and marketing executive provided strategic guidance, the IT manager was responsible for executing the firm's vision by managing evolving technical requirements and vendor relationships. Ultimately, ALPHA remained committed to its ERP-based CRM approach, navigating the ongoing tension between customisation and efficiency. However, unresolved technological constraints and ongoing internal debates indicated that the adoption of a CRM system was still uncertain, with the need for a fully integrated solution remaining on the horizon.

Fig.5 Routinisation phase actors' interfaces and relationships



Source: Authors' elaboration

Figure key: Arrows determine a direct relationship. Blue shield is the consultant firm, Orange shield is the BETA SW house, Dark green shield is ALPHA, Light green are the other technology providers. Within ALPHA the three actors that were involved in the routinisation phase.

5. Discussion

5.1 Theoretical implications

5.1.1 An interactive perspective of the CRM adoption

Recent research on digital transformation and organisational change has widely criticised the idea that technological adoption follows a predictable, linear trajectory (Suoniemi et al., 2022). These studies emphasise that adoption processes are emergent and shaped by local contingencies, iterative learning and continuous negotiation among interdependent actors (Orlikowski, 2000). In line with this view, this study shows that also CRM adoption in SMEs should be considered an interactive, recursive and non-linear process.

In the case of ALPHA, through network interactions, the firm ultimately decided against purchasing a stand-alone CRM system and instead opted to embed CRM-like functionalities within its existing ERP system, thus adopting a CRM approach rather than just a software. This adaptation reflects the embedding of digital functionalities within established organisational and technological structures rather than the straightforward acquisition of software (Håkansson & Waluszewski, 2002). Such situated strategies suggest that departures from initial implementation plans may indicate strategic rationality and organisational learning rather than failure.

The case study demonstrates that adoption outcomes are not predetermined but rather emerge from inter-organisational interactions. The interactions between the three key actors — the SME, the software vendor and the consultancy firm— play a central role in this process, shaping feasible, context-sensitive solutions. This triadic interaction is an example of what IMP scholars describe as the co-evolution of resources and relationships: changes in ALPHA's internal systems, BETA's technical proposals and the consultant's interpretative role continuously reshaped each other throughout the adoption process (Håkansson & Snehota, 1995; Baraldi et al., 2012). In the context of CRM adoption in SMEs, success should therefore be measured by the extent to which relational and technical alignments enable the firm to generate learning and value over time.

5.1.2 The CRM adoption key actors

Previous research has typically conceptualised CRM adoption as a dyadic process between buyers and vendors, emphasising the technological and managerial alignment necessary for system implementation between these two actors (Nguyen & Waring, 2013; Suoniemi et al., 2022; Farhan et al., 2018). Conversely, research within the IMP tradition has increasingly emphasised the networked and multi-actor nature of technological transformation processes (e.g. Ferreira & Lind, 2023).

Although prior studies have examined the role of consultants in technology adoption, the CRM literature has paid limited attention, particularly in the context of SMEs, to the specific interpretive and mediating role of external consultants in bridging technical and organisational domains (cfr. Ghobakhloo et al., 2012; Canato & Giangreco, 2011). Building on the IMP analytical lens, this study extends prior understanding of CRM adoption by showing how, in SMEs context, consultants may become crucial mediators of meaning and coordination between buyers and vendors throughout the CRM adoption process (cfr. Galvani & Bocconcelli, 2022).

Therefore, Alpha case study highlights that CRM adoption in SMEs does not unfold through a buyer-vendor relationship, as much of the literature

on CRM assumes (Payne & Frow, 2005; Dalla Pozza et al., 2018). Instead, it evolves as a triadic configuration involving the SME, the software vendor and an external consultant acting as a relational mediator. It is also worth noting that SMEs lack the internal expertise to evaluate technological implications and the resources to manage digitalisation processes (European Investment Bank, 2020). The study emphasises that vendors typically focus on system functionalities and commercial outcomes. Therefore, the consultant's role emerges as a potential mediator over the tensions between these two actors, enhancing CRM adoption process interactions by translating managerial needs into technical specifications and reframing vendor solutions in terms that are meaningful to the client's operations. This interpretive role aligns with the IMP notion of boundary-spanning actors who facilitate the translation of resources across organisational interfaces (Hoholm & Olsen, 2012; Baraldi et al., 2012). Within the IMP realm, this triadic setting exemplifies a network interaction (Håkansson & Snehota, 1995; Ford et al., 2011), in which value emerges through interdependencies rather than isolated actions. Therefore, the study advances existing CRM knowledge by highlighting the crucial role of consultants as mediators between technical and managerial domains, as well as between buyers and vendors. They help SMEs to avoid unsuitable technological investments and steer CRM adoption decisions towards context-appropriate solutions.

5.1.3 interactive learning and strategic adjustment

Previous studies have generally depicted misalignment and a lack of resources as obstacles to implementation and innovation (Nguyen & Waring, 2013; Farhan et al., 2018; Suoniemi et al., 2022). However, the Alpha case offers a more nuanced interpretation. Rather than being viewed as mere obstacles, moments of misalignment during the CRM adoption process provided opportunities for reflection, dialogue, and strategic reassessment. Building on these findings, this study examines how such dynamics operated within the CRM adoption process of an SME. The findings show that frictions and tensions acted as triggers for reflection, dialogue, and strategic reassessment — particularly when vendor proposals conflicted with organisational routines and managerial expectations. These moments of disagreement prompted individuals to question initial assumptions and explore alternative solutions, thereby fostering organisational learning (Weick, 1995).

In line with previous studies on technological embedding and organisational adaptation (Håkansson & Waluszewski, 2011; Hoholm & Olsen, 2012), the results indicate that conflictual interactions can facilitate the reconfiguration and coordination of resources. However, the Alpha case

study emphasises the importance of these dynamics in the context of CRM adoption by SMEs, where limited internal expertise and resources can lead to misaligned technological investments.

Specifically, the tensions that emerged between the SME and the vendor — mediated by the consultant's interpretive role — played a constructive function by preventing ALPHA from committing to an unsuitable stand-alone CRM system. Instead of leading to project failure, these tensions encouraged critical evaluation and supported the development of a more context-sensitive solution that was integrated into the existing ERP system. In this sense, frictions operated as mechanisms of organisational learning and strategic adjustment.

5.2 Managerial implications

From a managerial perspective, recognising frictions and tensions as moments of constructive disagreement can help SMEs to avoid unsuitable technological choices and to promote more sustainable paths of digital transformation. Table 2 summarises the main stages, actors, and decision outcomes observed in the Alpha case, illustrating how different frictions unfolded and were addressed throughout the CRM adoption process. The sequence shows how initial strategic and organisational conflicts evolved into resource and infrastructural adaptations, ultimately leading to the stabilisation of a CRM-like ERP solution.

The study emphasises the strategic importance of consultants as 'boundary actors', mediating between technical and organisational domains to ensure that CRM systems evolve in line with business needs. For software vendors, the findings emphasise the importance of working together to develop solutions that reflect the strategic priorities and organisational routines of client firms. Furthermore, from a managerial perspective, the findings emphasise the importance of viewing frictions as constructive components that support digital transformation.

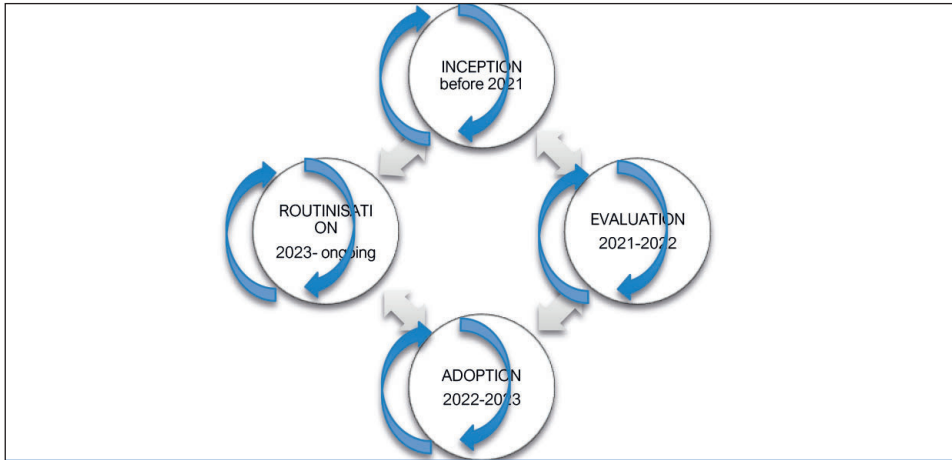
Table 2. Evolution of Frictions and Decisions during CRM Adoption in ALPHA

| Phase | Interface | Type of friction | Actors involved | Nature of tension | Outcome Decision |
|---------------|---|----------------------------|---------------------------------|--------------------------|--------------------------------|
| Inception | Organisational units – Relationships interface (consultant’s marketing analysis vs established ALPHA–BETA technological relationship) | Strategic / Organisational | ALPHA – Consultant firm – BETA | Challenge to vendor role | Escalation of conflict |
| Evaluation | Product – Facilities interface (CRM software vs ERP infrastructure) | Technological | ALPHA – BETA | CRM–ERP misalignment | Rejection of off-the-shelf CRM |
| Adoption | Product – Organisational units interface (CRM logic vs internal routines and ERP-based processes) | Resource / organisational | ALPHA – BETA | Reduced vendor influence | Embedding in ERP |
| Routinisation | Facilities – Facilities interface (ERP infrastructure vs external technological modules) | Infrastructural | ALPHA – BETA – External vendors | Integration issues | CRM-like ERP stabilisation |

Source: Authors’ elaboration based on case data

Managers should recognise tensions as learning signals and use them to encourage reflection and design solutions that are more closely aligned with their firm’s operational reality. Although Cruz-Jesus (2019) identifies three main phases, the Alpha CRM adoption process evolved through four distinct phases, as shown in Figure 1 below. The following sections present each phase of the Alpha CRM adoption process.

Fig.2 6 ALPHA CRM adoption process overview



Source: Authors' elaboration.

6. Conclusions

This study examined how the adoption of CRM unfolds through the interaction of network actors. Using the IMP perspective as an analytical lens, the research showed that, rather than being a linear technological implementation, CRM adoption in SMEs is a process of negotiation, adaptation and situated learning embedded in a network of interdependent actors.

In response to the research question — How does the adoption of CRM unfold through the interactions of network actors? This study identifies the interplay between three key actors: the SME (buyer), the software vendor and the consultancy firm. Their ongoing interaction influences strategic decisions, information flows and alignment processes, shaping how CRM adoption evolves. The study suggests that the consultant plays a pivotal mediating and interpretive role between the buyer and the vendor, playing in the interfaces where frictions emerge and actor tensions arise. Through consultants' involvement, SMEs may become better able to clarify their expectations, cope with asymmetries in expertise and power, and reconcile strategic concerns with operational requirements. Therefore, the study posits that CRM adoption is a networked process, shifting the focus from internal readiness to the interactive, relational and interpretive dynamics that sustain technological change.

Frictions and tensions emerge as mechanisms that shape CRM adoption process. Rather than having just downside the paper showed frictions and

tension upsides leading the actors to reassess the direction of adoption process. This is in line with frictions and tension literature (e.g. Prenkert et al., 2022) that is based as learning mechanism rather than hindering mechanism. In the Alpha case, for example, moments of disagreement exposed inconsistencies between the proposed technological solution and the firm's marketing and sales strategy, ultimately redirecting the adoption path.

Furthermore, the study highlighted the non-linear and recursive nature of CRM adoption. Rather than following a predefined sequence, the process evolved through interaction among the actors involved.

This study provides a novel perspective on CRM adoption in SMEs as an interaction-driven, iterative process, whereby technological outcomes emerge from the ongoing interaction between interdependent actors.

6.1 Limitations and further research avenues

The study focused on an SME operating in the construction and equipment rental sector. While this case study provided an insightful exploration of CRM adoption dynamics, further research is required to determine whether these findings can be applied to other organisational contexts. Comparative studies involving multiple SMEs from different industries or countries could help to establish whether the observed patterns — particularly the triadic interplay between the SME, vendor and consultant — hold true in diverse relational and institutional settings.

Another limitation concerns the study's longitudinal scope. While data collection spanned several stages of the adoption process, future research could extend the temporal scope to capture long-term post-adoption adjustments, as well as the evolution of relationships between actors once CRM or CRM-like solutions have become established. This could deepen our understanding of how frictions evolve over time, and of how learning mechanisms persist or fade beyond the initial decision-making phase.

Furthermore, while this study applied the IMP framework as an analytical lens, its purpose was interpretive rather than extending the theory. Future research could explicitly bridge IMP concepts with other theories, such as organisational learning, institutional work or technology-in-practice, to develop a more comprehensive understanding of how frictions operate as feedback loops in digital transformation.

Finally, future research could explore how firms strategically leverage frictions in broader digitalisation initiatives, such as the adoption of enterprise systems, AI-based business intelligence tools or automation platforms. By comparing firms that successfully manage frictions with those that do not, researchers could advance the study of digital transformation as a relational, recursive and learning-driven process, rather than a purely technological one.

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