

INSTITUTO
SUPERIOR
DE CONTABILIDADE
E ADMINISTRAÇÃO
DO PORTO
POLITÉCNICO
DO PORTO

M

MESTRADO
NEGÓCIO ELECTRÓNICO

A Customer Relationship Management Implementation: The JCDecaux Portugal case

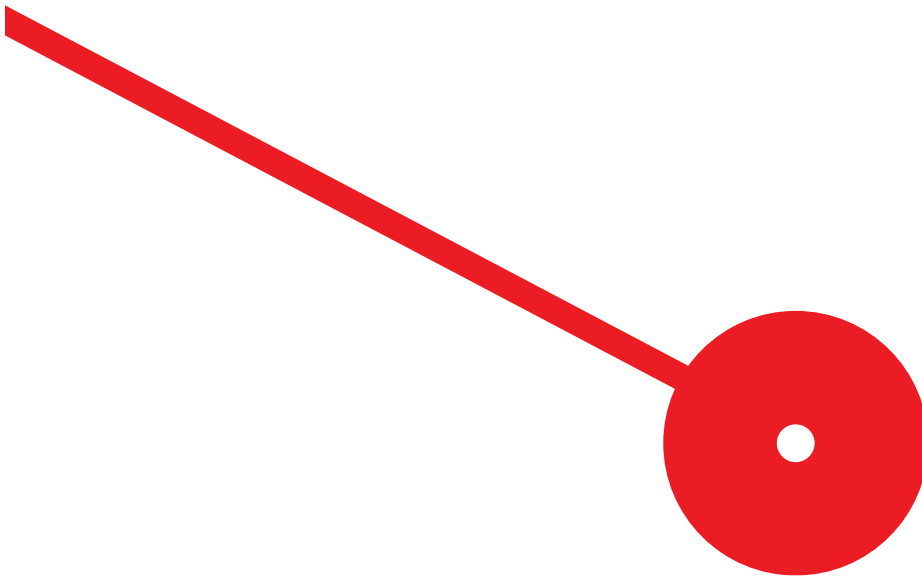
Mário Alexandre Valente Ribeiro

09/2024

Mário Alexandre Valente Ribeiro. A Customer Relationship Management

Implementation: The JCDecaux Portugal case

09/2024



INSTITUTO
SUPERIOR
DE CONTABILIDADE
E ADMINISTRAÇÃO
DO PORTO
POLITÉCNICO
DO PORTO

M

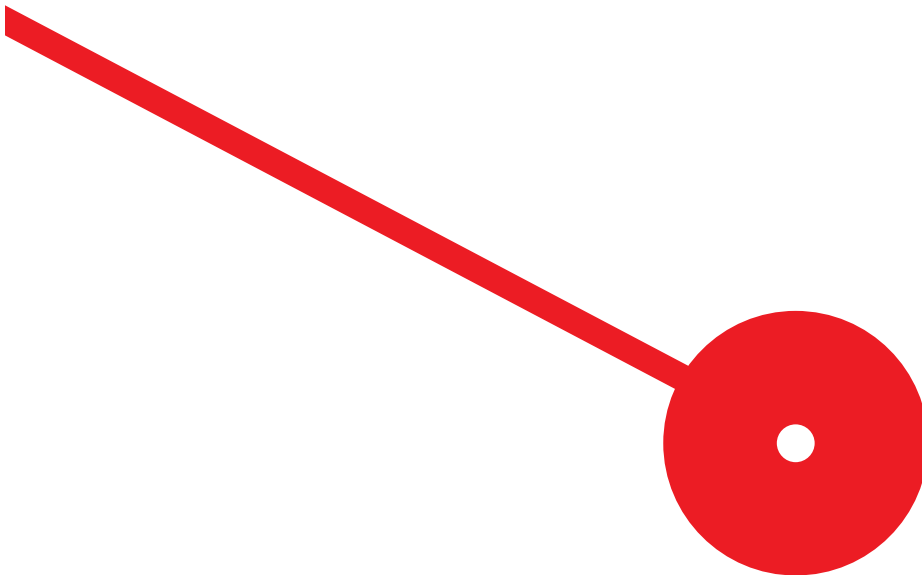
MESTRADO
NEGÓCIO ELECTRÓNICO

A Customer Relationship Management Implementation: The JCDecaux Portugal case

Mário Alexandre Valente Ribeiro

09/2024

Dissertação de Mestrado apresentado ao Instituto Superior de Contabilidade e Administração do Porto para a obtenção do grau de Mestre em Negócio Electrónico, sob orientação da Dra. Rosalina Babo.



ACKNOWLEDGEMENTS

I would like to express my deepest gratitude to my mentor, Professor Rosalina Babo, whose patience, mentorship, and guidance have been invaluable throughout this journey. Your support and motivation have been essential in the completion of this dissertation.

I am also immensely grateful to my teammates from all departments involved and the board of JCDecaux Portugal, the company's CEO Phillipe Infante, Sales Director Vitor Martins (a mentor), Marketing Director Andreia Paulo, National Accounts Director Pedro Baptista, Head of Local Sales Gustavo Gonzalez (thank you for your immense support) and International Sales and Big Accounts Samuel Reis (last but essential with your support) for authorizing this research and for their shared information and guidance. Your cooperation and insights were crucial in bringing this to completion.

Lastly, but not least, I would like to thank my family for their unwavering support, patience and encouragement. Immense hours of not having family time will hopefully be well rewarded. Your belief in me has been a constant source of strength and inspiration. Thank you all for your contributions and support.

ABSTRACT

Any digital transformation within a company needs the adoption of advanced Customer Relationship Management (CRM) systems to streamline operations and enhance customer engagement. This dissertation examines the implementation of Salesforce CRM at JCDecaux Portugal through the lens of action research. It aims to provide an understanding of the strategies employed and explore how they can guideline future CRM implementations within the JCDecaux group and similar corporations.

Using an action research approach, the study involved continuous collaboration with key stakeholders from various departments, including sales, marketing, and Information Technology (IT). It used a combination of qualitative and quantitative methods, including surveys, group meetings, and system usage analysis, to gather insights into the process.

The findings reveal that the integration of Salesforce significantly improved data management, streamlined workflows, and enhanced decision-making capabilities. However, it also involved navigating complexities such as data migration, system integration, and user adoption. By applying Lewin's Change Management Model, Kotter's 8-Step Change Model, and the Unified Theory of Acceptance and Use of Technology (UTAUT), the study provides a theoretical framework to understand and manage these aspects effectively.

The results highlight the importance of continuous training, stakeholder engagement, and iterative feedback mechanisms in a CRM implementation. Additionally, it emphasizes the need for a user-centric design and scalability considerations to accommodate future growth.

This research contributes to the academic conversation on CRM implementation by demonstrating the applicability of action research in complex organizational settings. It offers practical recommendations for enhancing CRM adoption and underscores the strategic value of these systems in fostering customer-centric business practices. Future research should explore the long-term impacts of CRM systems and the role of advanced analytics in driving further improvements.

Keywords: CRM, Salesforce, Action Research, Change Management, JCDecaux, UTAUT Model, Kotter's 8-Step Change Model, Lewin's Change Management Model, Data Migration, System Integration, Customer Engagement

RESUMO

Para qualquer transformação digital dentro de uma empresa multinacional, é necessária a adoção de sistemas avançados de Gestão de Relacionamento com o Cliente (CRM) para otimizar operações e melhorar o envolvimento com o cliente. Esta tese examina a implementação do Salesforce CRM na JCDecaux Portugal através da metodologia investigação-ação. O objetivo é fornecer uma compreensão das estratégias usadas e explorar como elas podem orientar futuras implementações de CRM dentro do grupo JCDecaux e em empresas similares.

Usando a metodologia investigação-ação, o estudo envolveu a colaboração contínua com os utilizadores chave de vários departamentos, incluindo vendas, marketing e informática. Foram utilizados métodos qualitativos e quantitativos, incluindo questionários, reuniões de grupo e análise de uso do sistema, para reunir dados sobre o processo.

Os resultados revelam que a integração do Salesforce melhorou a gestão de dados, otimizou os fluxos de trabalho e aprimorou as capacidades de tomada de decisão. No entanto, também envolveu a passagem por complexidades como a migração de dados, integração de sistemas e adoção do sistema por parte dos usuários. Ao aplicar o Modelo de Gestão da Mudança de Lewin, o Modelo de 8 Etapas de Kotter e a Teoria Unificada de Aceitação e Uso de Tecnologia (UTAUT), o estudo fornece um quadro teórico para entender e gerir esses aspectos de forma eficaz.

Os resultados destacam a importância de um treino contínuo, o envolvimento das partes interessadas e mecanismos de “feedback” numa implementação de CRM. Além disso, enfatiza a necessidade de um design centrado no usuário e considerações de escalabilidade para acomodar o crescimento futuro.

Esta pesquisa contribui para a conversa académica sobre a implementação de CRM ao demonstrar a aplicabilidade da metodologia investigação-ação em contextos organizacionais complexos. Oferece recomendações práticas para melhorar a adoção de CRM e sublinha o valor estratégico desses sistemas em promover práticas empresariais centradas no cliente. Investigações futuras devem explorar os impactos a longo prazo dos sistemas de CRM e o papel da análise avançada em impulsionar melhorias adicionais.

Palavras-chave: CRM, Salesforce, Action Research, Change Management, JCDecaux, UTAUT Model, Kotter’s 8-Step Change Model, Lewin’s Change Management Model, Data Migration, System Integration, Customer Engag

Table of Contents

Acknowledgements	iii
Abstract	iv
Resumo	v
List of Figures	3
List of Tables.....	4
Abbreviations.....	5
Chapter I – Introduction.....	6
1. Background and Context	7
2. Statement of the Problem	8
3. Objectives of the Study	10
4. Dissertation Structure	12
Chapter II – Literature Review and Theoretical framework.....	13
5. PRISMA Analysis	14
6. Customer Relation Management (CRM).....	18
7. The UTAU Theory Model.....	20
8. Kotter’s 8-Step Change Model	22
9. Lewin’s Change Management Model.....	23
Chapter III – Contextualizing the CRM Implementation.....	25
10. JCDecaux.....	26
11. Pilot Project with Hubspot.....	28
12. The Evaluation Process	30
Chapter IV – Methodology and Case Context.....	31
13. Data Analysis Methodology	33
14. Limitations of the Study	34
15. The CRM System	35

16.	Rollout Planning and System Architecture Development.....	37
Chapter V – Results and Findings		46
17.	Analysis and Results.....	47
17.1	System Usage Analysis	57
17.2	Qualitative Feedback and Challenges	61
17.3	Impact on Organizational Processes	62
17.4	Theoretical Framework Application	64
Chapter VII – Conclusion.....		69
18.	Summary of Key Findings and Implications.....	70
19.	Theoretical Contributions	71
20.	Recommendations	72
21.	Future Research Directions	73
22.	Concluding Insights and Answer to the Research Question	74
References.....		76
Annexes.....		82
Appendixes		85

LIST OF FIGURES

Figure 1 – CRM Architecture (JCDecaux, 2023).....	38
Figure 2 – Final Navigation Menu (JCDecaux, 2023)	39
Figure 3 – Integration of a System in the Salesforce Paltform (JCDecaux, 2023).....	40
Figure 4 – Interaction between Salesforce and other systems (JCDecaux, 2023).....	41
Figure 5 – Global Search & List View (JCDecaux, 2023).....	41
Figure 6 – Fundamental Activities (JCDecaux, 2023)	42
Figure 7 - Initial Project Timeline (JCDecaux, 2023).....	43
Figure 8 – Project Implementation Phases (JCDecaux, 2023)	44

LIST OF TABLES

Table 1 – Flow Chart of PRISMA Results (adapted from PageMJ	15
Table 2 – Synthesis of the 5 studies obtained with PRISMA.....	16
Table 3 – Hubspot vs Salesforce criteria comparison	20
Table 4 - User feedback regarding Salesforce CRM usability and functionality	49
Table 5 – User feedback regarding Salesforce usability and functional needs categorized by themes.....	56
Table 6 - How many Accounts are Being Added to CRM chart.....	58
Table 7 - How many Opportunities are being added to CRM chart.....	59
Table 8 - How many tasks are being added to CRM chart.....	60
Table 9 - Key Findings in this research.....	70
Table 10 - Implications for JCDecaux Portugal	71
Table 11 - Recommendations for JCDecaux Portugal	73

ABBREVIATIONS

CRM	Customer Relationship Management
B2B	Business-to-Business
OOH	Out-Of-Home
IDIC	Identify, Differentiate, Interact, Customize
SaaS	Software as a Service
SUS	System Usability Scale
UTAUT	Unified Theory of Acceptance and Use of Technology
DOOH	Digital Out-Of-Home
IT	Information Technology

CHAPTER I – INTRODUCTION

1. Background and Context

In this century's business landscape, technology's role in shaping interactions between companies and their customers is undeniable. Central to this technological forefront is the Customer Relationship Management (CRM) system, a tool that has revolutionized how businesses manage and understand their customer interactions. These systems enable the aggregation and analysis of customer data, providing improved service delivery and enhanced customer satisfaction by informing better decision-making based on accurate data (Trainor et al., 2014).

The digital age has transformed customer management practices. With an abundance of information readily available, traditional approaches to attracting and retaining customers have evolved, giving birth to methodologies such as inbound and inside sales. Digital platforms are increasingly becoming the norm, extending or even replacing traditional advertising mediums. This shift enhances the need for dynamic tools like CRM systems, which provide the agility and insightful analytics essential for thriving in the advertising landscape.

Founded in 1964 by Jean-Claude Decaux, JCDecaux has become the world's largest outdoor advertising company. Originating with the innovative concept of funding street furniture through advertising, it revolutionized the industry while enhancing urban spaces with functional, aesthetic installations like bus shelters and public bicycles. Expanding globally, the company now operates in over 80 countries and 4,000 cities, leading in the out-of-home (OOH) advertising sector through a commitment to innovation, quality, and sustainability.

A primary reason for implementing a CRM system is to enhance customer relationship management. By consolidating customer data into a single platform, it can gain deeper insights into its customers' needs, preferences, and behaviours. This enables the tailoring of its interactions and offerings to meet individual customer expectations, thereby improving customer satisfaction and loyalty (Parvatiyar & Sheth, 2001).

Another critical reason for adopting a CRM platform is to integrate data from various sources, including sales, marketing, customer service, and finance. This integration provides an overview of customer interactions and business performance, enabling data-driven decision-making and strategic planning (Trainor et al., 2014). Also enhances collaboration across these departments by ensuring that all team members have access to up-to-date information. This transparency nurtures better coordination and

communication, enabling teams to work together more effectively to meet customer needs and drive business outcomes (Bala & Venkatesh, 2007).

In modern business practices, CRM systems emerge as a foundation for managing a company's interactions with current and potential customers. Kumar and Reinartz (2016) underscore the transformative potential of these systems in fostering enhanced customer satisfaction, loyalty, and retention. CRM serves as the backbone for integrating communication channels and customer data, offering companies a strategic vantage point to craft targeted, meaningful customer engagements (Jayachandran et al., 2005).

The strategic decision was driven by a confluence of factors, including the need to enhance operational efficiency, improve customer engagement, and leverage data analytics for informed decision-making. The adoption of inbound and inside sales methodologies emphasized the need for a platform that could centralize customer information, automate marketing and sales processes, and provide actionable insights to adapt to evolving market and consumer trends (Malthouse et al., 2013).

2. Statement of the Problem

Based on the literature review, several common problems are often encountered by companies when implementing CRM systems. One of the most frequent challenges is data integration and migration. Companies frequently face difficulties in integrating new CRM systems with existing systems, leading to issues such as data loss, inconsistencies, or inaccuracies during the migration process. This complexity of aligning with existing company processes and technologies is highlighted by Payne and Frow (2005), who note that significant integration challenges can arise.

Another common problem is user adoption and resistance to change. Users are often reluctant to adopt new systems due to a lack of training or fear of change, which serves as a significant barrier to successful implementations. Trainor et al. (2014) emphasize the importance of user engagement, and the challenges associated with ensuring that they fully embrace CRM initiatives. This resistance can come from a lack of understanding of the benefits or insufficient training on the new system.

Companies also struggle with the dilemma of customization versus standardization. Finding the right balance between customizing the system to fit specific business needs and maintaining a standardized system that is easier to manage, and update can be difficult. Over-customization can lead to increased complexity and maintenance

challenges, as discussed by Järvinen and Taiminen (2016). While customization can enhance CRM effectiveness, it can also complicate system updates and create long-term sustainability issues.

Ensuring data privacy and security is another critical challenge, especially with increasing regulations around data protection. Companies must ensure that they comply with data privacy laws, protecting sensitive customer data from breaches and meeting legal standards. Malthouse et al. (2013) highlight the importance of secure data management practices in CRM systems, particularly as companies handle growing volumes of customer data.

Lastly, aligning the CRM system with the overall business strategy is a common challenge in similar businesses. Companies often find that their CRM initiatives do not deliver the expected value because they are not sufficiently integrated with broader business objectives. Nahar and Dhaka (2014) stress the importance of aligning CRM initiatives with strategic goals to maximize their impact on customer satisfaction and business performance.

Implementing a CRM system is a complex task. It's not just about installing new software; it's about changing the entire way the company operates. The transition to a system, involves both technical and human elements, which must be carefully managed to ensure a successful implementation.

First, there's the technical side. When a company decides to switch to these types of platforms, they must move all their existing customer data to the new one. This process, known as data migration, can be complicated and risky. If not done correctly, important data could be lost. Another issue is making sure the new system works well with other software the company is already using. This is called system integration, and it's crucial for everything to work smoothly (King & Burgess, 2008).

Secondly, there's the human factor. People generally don't like change, especially in the workplace or in their work routine. When a new system comes in, the users must learn how to use it. This requires training, which takes time. Plus, the new system must fit into the existing company culture and processes (Kotter, 1996). If it doesn't, there might be resistance in its usage, making the whole transition more difficult (Järvinen & Taiminen, 2016).

In today's fast-changing world, companies like JCDcaux are at the vanguard of adopting new technologies to stay competitive. As the Portuguese branch moves to a CRM system, it will need to introduce new software to the daily routines and change how the company

operates with different departments involved. This significant shift means crossing both technical and human elements (Peppers & Rogers, 2016).

The research question that this work aims to answer is: "What strategies is JCDecaux Portugal using to make the transition to a CRM system, and how can these strategies be used to assist similar ones?". This question seeks to understand the strategies used to manage this transition, focusing on identifying potential challenges and how they are addressed. It's essential to understand how the company plans and executes it, particularly in managing data migration, system integration, and user training.

The impact of the transition on customer relationships is also critical. A well-implemented CRM system should enhance customer engagement and satisfaction by providing personalized services and improving communication. This aspect of the transition is vital for maintaining and strengthening JCDecaux's customer base (Verhoef, Reinartz, & Krafft, 2010).

This academic work is not just about one company's experience but about finding lessons that can be applied across JCDecaux's global operations and other companies facing similar challenges.

3. Objectives of the Study

The primary aim of this academic study is to conduct an in-depth examination of JCDecaux Portugal's strategic transition to Salesforce as their chosen CRM system. It represents a critical axis in the company's approach to customer relationship management, driven by the need to enhance operational efficiency, foster deeper customer engagement, and navigate the complexities of the global advertising market.

The main research question that this work will try to answer is "What strategies is JCDecaux Portugal using to make the transition to a CRM system, and how can these strategies be used to assist similar ones?".

It involves an analysis of the alignment with organizational goals, technological requirements, and the expected impact on daily operations. The decision-making process is a crucial aspect of CRM implementation, reflecting the company's strategic priorities and its approach to technological adoption (King & Burgess, 2008). By leveraging insights from this research, it will also examine how internal stakeholders perceived the decision and their initial reactions to the proposed change.

Focusing on the technical execution of the CRM transition, this objective examines the methodologies employed in migrating data from excel sheets and Hubspot to Salesforce and integrating it with existing systems. The challenges of ensuring data accuracy, security, and seamless system interoperability are central to this analysis. Understanding them is vital for highlighting the operational problems encountered and the solutions planned to overcome them. The survey data will provide additional insights into the technical issues faced by users and their satisfaction with the support provided.

By exploring the human dimension of the CRM implementation as an objective, this research investigates the change management strategies and training programs implemented to ease user adoption of Salesforce. Elaborating on organizational change theories, such as Lewin's Change Management Model and Kotter's 8-Step Change Model, it will focus on how JCDecaux Portugal managed user resistance and fostered a supportive environment for the new system (Kotter, 1996; Lewin, 1947). Survey data will be very important in evaluating the effectiveness of these training programs and the overall change management approach, highlighting areas of success and opportunities for improvement.

Other objective of this research will be studying the overall user satisfaction following the implementation. By analysing survey answers and user feedback, it aims to understand how the new CRM system has impacted daily operations and productivity. This qualitative assessment will provide insights into the practical benefits and challenges experienced by the users, contributing to a comprehensive evaluation of the system's effectiveness (Peppers & Rogers, 2016).

By compiling the information gained from JCDecaux Portugal's experience, this work seeks to outline the lessons learned and best practices for future CRM implementations. It will reflect on the strategic, technical, and human factors that contributed to the project, offering a roadmap for similar transformation initiatives (Almotairi, 2008). The survey data will provide real-world feedback from users, enhancing the identification of best practices and common pitfalls to avoid.

By focusing on these objectives, this research aims to not only document the company's journey, but also to extract actionable insights that can guide future transitions. This approach ensures that it is grounded in specific, real-world challenges and followed by a broader theoretical understanding of this system adoption and transformation.

4. Dissertation Structure

The structure of the dissertation will try to provide a clear vision, for readers to understand the flow and organization of the research. It's divided into six chapters, each addressing a specific aspect.

The first chapter, Introduction, starts by presenting the background and context of the research. It introduces the main research question, objectives, and the significance of the study. It also gives the rationale behind choosing JCDecaux Portugal's CRM implementation as the focus of the research.

In the second chapter, Literature Review and Theoretical Framework, the existing literature on CRM systems, and change management models is reviewed. It provides a theoretical foundation for the dissertation, discussing key concepts such as Lewin's Change Management Model, Kotter's 8-Step Change Model, and the Unified Theory of Acceptance and Use of Technology (UTAUT).

The third chapter, Contextualizing the CRM Implementation, starts with an introduction to JCDecaux, followed by a detailed discussion on the pilot project with HubSpot. It concludes with the evaluation process of this pilot implementation, setting the stage for a broader CRM adoption.

The fourth chapter, Methodology and Case Context, explains the data analysis methodology utilized in this study. It addresses the limitations of the study and provides an overview of the CRM system that was implemented. This chapter aims to align the research methods with the practical challenges and outcomes of the CRM implementation.

The fifth chapter, Results and Findings, provides the outcome of the research. It includes an analysis of survey results, system usage data, and qualitative feedback. It examines the impact of Salesforce and applies the theoretical frameworks discussed in Chapter 2 to the findings from the CRM implementation.

The sixth and final chapter, Conclusion, synthesizes the research findings, drawing connections between the data and the theoretical frameworks. It considers the implications of the results for JCDecaux Portugal and provides practical recommendations for future implementations. Are also identified areas for future research, addresses the research question, and reflects on the study's contributions to the academic discussion on these types of implementations.

CHAPTER II – LITERATURE REVIEW AND THEORETICAL FRAMEWORK

5. PRISMA Analysis

Customer Relationship Management (CRM) systems have been increasingly studied in various business contexts. This literature review aims to address the existing studies on CRM systems and implementations, with a specific focus on their application in large multinational corporations.

The Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA) methodology is employed in this review to ensure a rigorous and transparent approach. PRISMA emphasizes the systematic identification, selection, and synthesis of relevant studies, providing an overview of the existing literature (Moher et al., 2009). This methodology involves four main phases: identification, screening, eligibility, and inclusion. In the identification phase, a broad range of studies is gathered using specific keywords and databases. The screening phase involves reviewing abstracts and titles to exclude irrelevant studies. During the eligibility phase, full-text articles are assessed against predefined criteria to ensure relevance and quality. Finally, the inclusion phase involves selecting studies that meet all criteria for detailed analysis (Liberati et al., 2009). In the identification phase, a broad search was conducted across multiple academic databases, including Google Scholar, Scielo, and RCAAP, using specific keywords such as "CRM systems," "inbound marketing," "inside sales," "CRM implementations," and "CRM case studies." This search aimed to gather all potentially relevant studies published between 2000 and 2023. Additional sources included industry publications and conference events to ensure a thorough exploration of both academic and practical perspectives.

The screening phase is the second one and involved reviewing the titles and abstracts of the studies identified in the first step. Studies that did not focus on CRM systems, inbound marketing, inside sales, or the CRM implementations were excluded. Additionally, studies not published in English or lacking full-text availability were also removed. This phase aimed to filter out irrelevant studies and narrow down the relevant literature.

During the eligibility phase 3, the full-text versions of the remaining studies were assessed against predefined inclusion and exclusion criteria. The inclusion criteria included studies focusing on CRM systems implementations, research specifically addressing the advertising industry, particularly OOH advertising and studies examining the implementation of CRM systems in large multinational corporations.

The exclusion criteria were made of studies not providing empirical data, articles lacking methodological rigor and publications focusing solely on small businesses or non-advertising sectors.

The last phase, the inclusion phase involved selecting the studies that met all the criteria established in the eligibility phase for detailed analysis. This final pool of studies was used to extract data, identify key themes, and synthesize findings relevant to the objectives of this dissertation.

Bellow, on table 1, is the outcome.

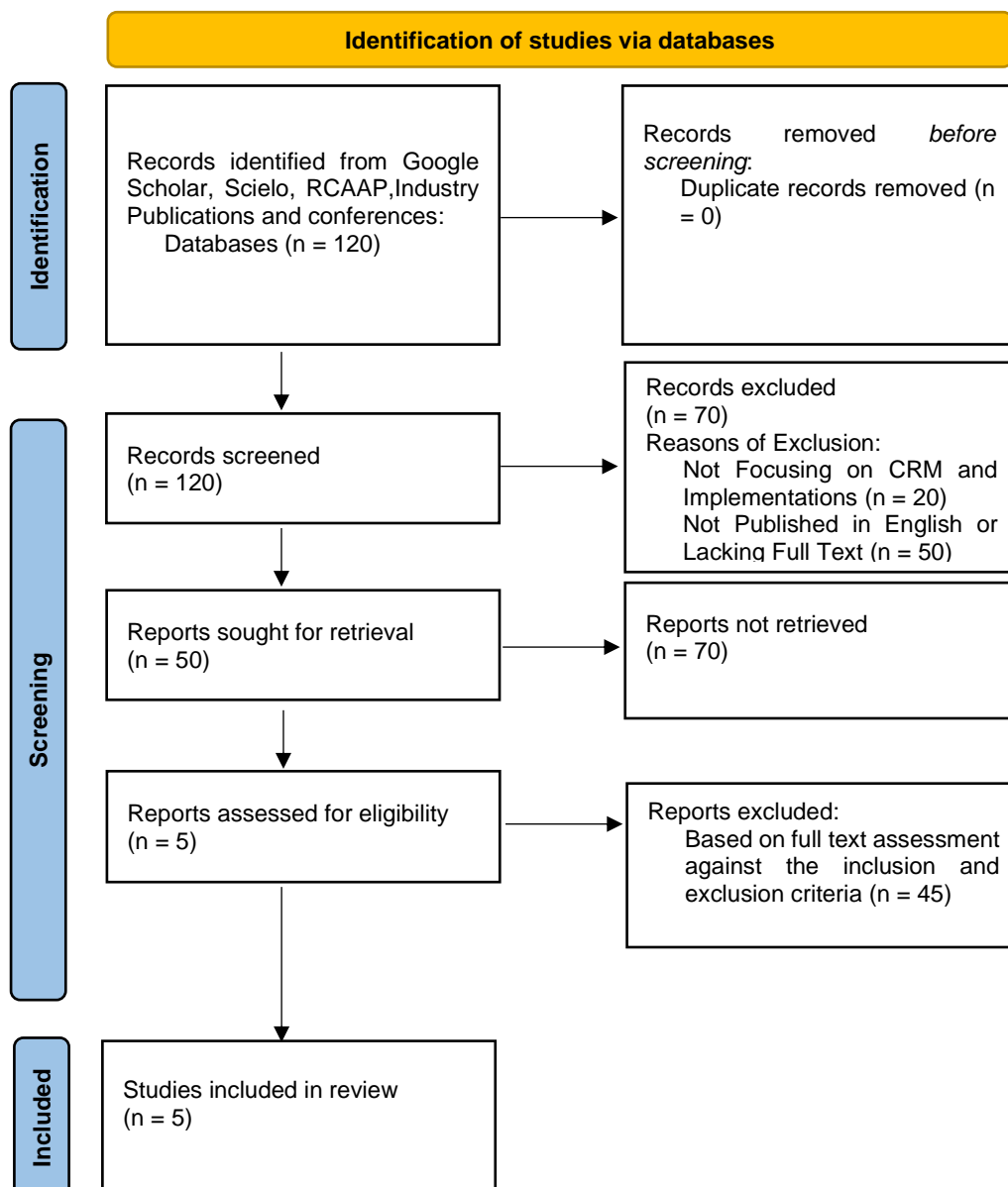


Table 1 – Flow Chart of PRISMA Results (adapted from PageMJ)

The five studies obtained by the final phase of the PRISMA are resumed in the following table 2:

Article	Focus	Relevance
Payne, A., & Frow, P. (2005). A strategic framework for customer relationship management. <i>Journal of Marketing</i> , 69(4), 167-176. https://doi.org/10.1509/jmkg.2005.69.4.167	Strategic framework for CRM implementation.	Provides foundational insights into CRM strategies applicable to large corporations.
Trainor, K. J., Andzulis, J. M., Rapp, A., & Agnihotri, R. (2014). Social media technology usage and customer relationship performance: A capabilities-based examination of social CRM. <i>Journal of Business Research</i> , 67(6), 1201-1208. https://doi.org/10.1016/j.jbusres.2013.05.002	Impact of social media on CRM performance.	Highlights technological integration challenges and strategies in CRM adoption.
Järvinen, J., & Taiminen, H. (2016). Harnessing marketing automation for B2B content marketing. <i>Industrial Marketing Management</i> , 54, 164-175. https://doi.org/10.1016/j.indmarman.2015.07.002	Use of marketing automation in B2B contexts.	Discusses marketing and CRM integration.
Nahar, S., & Dhaka, P. (2014). A Review: Benefits and Critical Factors of Customer Relationship Management. <i>Global Journal of Computer Science and Technology</i> . https://www.semanticscholar.org/paper/A-Review-%3A-Benefits-and-Critical-Factors-of-Nahar-Dhaka/c4e0f13e63eada85e0c825385649531df8e5f290	CRM impact on customer satisfaction.	Provides insights into CRM practices in service-oriented industries.
Malthouse, E. C., Haenlein, M., Skiera, B., Wege, E., & Zhang, M. (2013). Managing customer relationships in the social media era: Introducing the social CRM house. <i>Journal of Interactive Marketing</i> , 27(4), 270-280. https://doi.org/10.1016/j.intmar.2013.09.008	Social CRM.	Explores modern CRM practices.

Table 2 – Synthesis of the 5 studies obtained with PRISMA

The findings from these studies provide insights and help to establish a theoretical foundation for understanding the CRM implementation at JCDecaux Portugal.

Payne and Frow (2005) provide a strategic framework for implementing CRM systems, emphasizing the importance of aligning its strategies with business objectives. They highlight key components of these systems, such as customer data management, customer interactions, and performance measurement, underscoring the significance of integrating

them into the overall business strategy to enhance customer satisfaction and loyalty. This understanding of CRM systems is essential for analysing JCDecaux Portugal's transition to Salesforce, highlighting the importance of strategic alignment and integration within the business.

Trainor et al. (2014) examine the role of social media technologies in enhancing CRM performance, exploring how social CRM capabilities can improve customer engagement and relationship performance. They provide insights into the integration of social media with these systems and its impact on customer satisfaction and loyalty. The integration of social media technologies is pertinent to JCDecaux's CRM implementation, especially in enhancing customer engagement through digital platforms.

Järvinen and Taiminen (2016) explore the use of marketing automation tools in B2B content marketing, highlighting how marketing automation can streamline marketing processes and improve lead generation and nurturing. Their findings suggest that marketing automation, when integrated with CRM systems, can significantly enhance marketing efficiency and effectiveness. This insight is relevant to JCDecaux's adoption of Salesforce, particularly in optimizing marketing and sales processes.

Reinartz, Krafft, and Hoyer (2004) investigate the impact of CRM on customer satisfaction and business performance, focusing on the importance of data integration and analysis in CRM success. Their study underscores their role in providing a unified view of the customer, which is essential for personalized marketing and improved customer service. The emphasis on data integration and analysis aligns with JCDecaux's objectives in implementing Salesforce to achieve a comprehensive understanding of customer interactions.

Malthouse et al. (2013) introduce the concept of the Social CRM House, examining how CRM practices have evolved with the advent of social media. They emphasize the importance of personalized interactions and the integration of social media data into CRM systems to improve customer engagement and relationship management. This study is particularly relevant for JCDecaux as it navigates the complexities of integrating digital and traditional advertising channels.

These five studies collectively highlight the critical aspects of CRM systems, from strategic alignment and social media integration to marketing automation and change management. They provide a robust theoretical framework for understanding the CRM implementation process at JCDecaux Portugal. The literature reveals a significant gap in the research specifically focusing on CRM implementations. This lack of scientific

research underscores the uniqueness and importance of this dissertation, which aims to bridge this gap by providing practical insights and guidelines for similar transitions in other companies.

6. Customer Relation Management (CRM)

Customer Relationship Management (CRM) systems are essential technological tools designed to manage a company's interactions with current and potential customers. These systems are inherent to modern business strategies, offering a suite of functionalities that help streamline processes, build customer relationships, increase sales, and improve customer service (Payne & Frow, 2005). By merging customer information into a single repository, it enables businesses to better organize and manage their interactions, providing a holistic view of each customer.

These implementations have been studied and shown to enhance customer satisfaction and loyalty, ultimately driving business success (Reinartz, Krafft, & Hoyer, 2004). For instance, it allows for the automation of marketing, sales, and service processes, leading to increased efficiency and effectiveness. This automation supports sales teams by providing detailed customer histories, tracking sales interactions, and predicting future customer needs, thereby simplifying a more personalized and proactive approach to customer management (Buttle & Maklan, 2015).

Additionally, CRM systems play an important role in the strategic management of customer relationships. By leveraging data analytics, businesses can gain valuable insights into customer behaviours and preferences, enabling more informed decision-making. This data-driven approach helps in identifying high-value customers, tailoring marketing efforts, and optimizing the allocation of resources to maximize return on investment (ROI) (Nahar & Dhaka, 2014). It also supports the integration of various customer-facing processes, ensuring that all departments within an organization have access to up-to-date information. This integration allows collaboration and coordination across marketing, sales, and customer service teams, leading to a more cohesive and consistent customer experience (King & Burgess, 2008).

The adoption of these systems as some challenges. One significant obstacle is the technical complexity involved in integrating it with existing systems and ensuring data accuracy during migration (Trainor et al., 2014). Additionally, the human factor cannot be overlooked; successful CRM implementation requires comprehensive training

programs and change management strategies to overcome user resistance and ensure adoption (Kotter, 1996).

In the context of multinational corporations, these types of implementations are particularly complex due to the need to accommodate diverse markets and regulatory environments (Javalgi et al., 2014). It must be flexible and scalable to meet the varying requirements of different regions while maintaining a unified global strategy (Payne & Frow, 2005). This dual focus on local adaptation and global integration is crucial for optimizing customer relationship management across all markets.

There are numerous CRM platforms available on the market, each offering a range of features tailored to different business needs. Among the most popular and widely used systems are HubSpot and Salesforce. Both platforms are recognized for their strong functionalities and scalability, making them suitable for businesses of various sizes and HubSpot CRM is known for its user-friendly interface and ease of use, particularly appealing to small and medium-sized businesses. It offers a range of features designed to support marketing and sales strategies. Key features include contact management, email marketing, lead tracking, and sales automation. HubSpot's CRM is integrated with its suite of marketing, sales, and service tools, providing a comprehensive solution for managing customer relationships (HubSpot | Software, Tools, Resources for Your Business, 2023).

Salesforce, on the other hand, was adopted as a comprehensive solution aimed at integrating all commercial and marketing departments. Unlike HubSpot, which was limited to inbound sales, Salesforce was designed to be an all-inclusive platform that would manage not just customer relationships but also inventory and campaign management through the integration of external programs like VIOOH.

It is often considered the leader in the CRM space, particularly for medium to large enterprises. Its platform is highly customizable and scalable, offering a wide array of features that can be tailored to suit complex business needs. While it offers a robust set of features, it's often considered to be on the more complex end of the spectrum, requiring specialized skills for customization and maintenance. This makes it less accessible for small businesses or those without a dedicated IT team. However, its extensive capabilities make it a preferred choice for larger organizations looking to integrate various business functions into a single, unified platform (Salesforce, n.d.).

To effectively compare HubSpot and Salesforce has shown in table 3 bellow, it was used six criteria key points.

Criteria	Hubspot	Salesforce
Features	Basic CRM features, inbound marketing tools, email marketing, lead tracking, sales automation	Advanced CRM features, custom reporting, automation tools, AI-powered insights, industry-specific solutions
Scability	Suitable for SMB's, limited scability for large enterprises	Highly scalable, suitable for large enterprises
User-Friendliness	User-friendly, intuitive interface, quick learning curve	More complex, slower learning curve, requires training
Integration Capabilities	Integrated with HubSpot's suite of tools, limited third-party integrations	Extensive integration capabilities, supports numerous third-party applications
Customization	Limited customization options, suitable for standard business processes	Highly customizable, can be tailored to specific business needs
Cost	Free basic version, paid tiers for additional features	Higher cost, various pricing tiers based on features and number of users

Table 3 - Hubspot vs Salesforce criteria comparison

7. The UTAU Theory Model

The Unified Theory of Acceptance and Use of Technology (UTAUT) is a comprehensive model formulated by Venkatesh et al. in 2003. This theory aims to explain user intentions to use information systems and their subsequent usage behaviour. The UTAUT model is a consolidation of elements from eight preceding models, each contributing unique insights into technology acceptance (Venkatesh et al., 2003).

The first of these models is the Theory of Reasoned Action (TRA) by Fishbein and Ajzen (1975), which posits that individual behaviour is driven by behavioural intentions, where these intentions are a function of an individual's attitude toward the performance and subjective norms. The second is the Technology Acceptance Model (TAM) by Davis (1989), which focuses on perceived usefulness and perceived ease of use as primary factors influencing user acceptance of technology.

The Motivational Model (MM) suggests that behaviour is influenced by intrinsic and extrinsic motivations (Davis et al., 1992). Ajzen's (1991) Theory of Planned Behaviour (TPB) expands on TRA by adding perceived behavioural control as a determinant of intention and actions. The Combined TAM and TPB model integrate elements from both TAM and TPB, offering a comprehensive view of factors influencing technology adoption (Taylor & Todd, 1995).

The Model of PC Utilization (MPCU) focuses on factors affecting personal computer usage, including job-fit, complexity, long-term consequences, affect towards use, social factors, and facilitating conditions (Thompson et al., 1991). The Innovation Diffusion Theory (IDT) by Rogers (1995) looks at how, why, and at what rate new ideas and technology spread through cultures. Lastly, the Social Cognitive Theory (SCT) by Bandura (1986) emphasizes the interplay between personal, behavioural, and environmental influences on behaviour.

The UTAUT model itself consolidates these theories into four main constructs: performance expectancy, effort expectancy, social influence, and facilitating conditions (Venkatesh et al., 2003). Performance expectancy is the degree to which an individual believes that using the system will help them attain gains in job performance. Effort expectancy is the degree of ease associated with the use of the system. Social influence is the degree to which an individual perceives that important others believe they should use the new system. Facilitating conditions are the degree to which an individual believes that an organizational and technical infrastructure exists to support the use of the system. Moreover, the UTAUT model includes four moderating variables that influence the impact of these constructs on user intention and behaviour: gender, age, experience, and voluntariness of use (Venkatesh et al., 2003). These moderators help to tailor the impact of the main constructs, providing a nuanced understanding of technology adoption across different user demographics.

The importance of the model to this study lies in its ability to offer an organized structure for examining the factors influencing the adoption and use of Salesforce CRM at JCDecaux Portugal. Understanding performance expectancy can help identify how users perceive the benefits of Salesforce in improving their job performance, such as better customer relationship management and streamlined sales processes (Venkatesh et al., 2003). Effort expectancy will shed light on the perceived ease of using Salesforce, which is crucial for its acceptance among employees. The role of social influence can be explored by examining how the opinions of managers and peers affect the decision to

adopt Salesforce. Finally, facilitating conditions will assess the availability of resources and support structures necessary for the effective use of Salesforce.

Applying the UTAUT model in this context not only helps to identify potential barriers to CRM adoption but also provides insights into the strategies that can be employed to enhance user acceptance and effective use of the system. By addressing the constructs of performance expectancy, effort expectancy, social influence, and facilitating conditions,

8. Kotter's 8-Step Change Model

Kotter's 8-Step Change Model is a comprehensive framework for implementing organizational change, developed by John Kotter in 1996. This model outlines a structured approach to change management, highlighting the importance of leadership and clear communication in driving successful transformations. The steps are as follows:

1. **Creating a Sense of Urgency:** involves identifying potential threats and developing scenarios to illustrate the need for change. It aims to motivate employees to recognize the importance and immediacy of the change (Kotter, 1996).
2. **Forming a Guiding Coalition:** Assembling a group with enough power and influence to lead the change efforts. This coalition works as a team to provide direction and support throughout the change process (Kotter, 1996).
3. **Developing a Vision and Strategy:** Crafting a clear vision to direct the change effort and developing strategies to achieve this vision. This step ensures that everyone understands the desired outcomes and the path to get there (Kotter, 1996).
4. **Communicating the Change Vision:** Using every possible channel to communicate the new vision and strategies. It is crucial to address employees' concerns and anxieties, ensuring they understand and accept the vision (Kotter, 1996).
5. **Empowering Broad-Based Action:** Removing obstacles that hold back the change process, encouraging risk-taking, and enabling constructive feedback. This step empowers employees to act on the vision and contribute to the change (Kotter, 1996).

6. **Generating Short-Term Wins:** Planning for and creating visible improvements or wins early in the change process. Recognizing and rewarding employees involved in these early wins is vital for maintaining momentum (Kotter, 1996).
7. **Consolidating Gains and Producing More Change:** Using the credibility from early wins to drive more significant changes. Involves analysing what went right and what needs improvement, ensuring continuous progress (Kotter, 1996).
8. **Anchoring New Approaches in the Culture:** Reinforcing the changes by demonstrating their success and linking them to organizational success. It involves ensuring that the new behaviours are rooted in the organizational culture (Kotter, 1996).

This model emphasizes the critical role of leadership in change management and highlights the need for clear and consistent communication throughout the change process. Each step builds on the previous one, ensuring a structured and holistic approach to organizational transformation.

9. Lewin's Change Management Model

Kurt Lewin's Change Management Model, developed in 1947, is a straightforward framework for managing organizational change. It consists of three stages: Unfreeze, Change (or Transition), and Refreeze. This model can significantly enhance the implementation of Customer Relationship Management (CRM) systems.

1. **Unfreeze:** Preparing for Change
 - **Assess the current state:** Identify existing processes and systems that need change.
 - **Create awareness:** Communicate the need for the new CRM system and its benefits.
 - **Generate support:** Build a coalition of stakeholders to support the change.
2. **Change (Transition):** Implementing the Change
 - **Develop a change plan:** Create a detailed plan for CRM implementation, including timelines and responsibilities.
 - **Provide training and support:** Ensure employees are well-trained and supported throughout the transition.

- **Manage resistance:** Address any resistance to change through communication and involvement.

3. **Refreeze:** Solidifying the Change

- **Reinforce new behaviours:** Encourage and reward the use of the new CRM system.
- **Evaluate and adjust:** Monitor the implementation and make necessary adjustments.
- **Establish new norms:** Integrate the new CRM practices into daily routines.

CHAPTER III – CONTEXTUALIZING THE CRM IMPLEMENTATION

This chapter lays the groundwork for the dissertation by contextualizing the study within JCDecaux, the company at the heart of this investigation. It begins by introducing the company, detailing its evolution into a leader in the global outdoor advertising industry and its pioneering adoption of digital advertising technologies. The discussion then shifts to JCDecaux Portugal's strategic adoption of a CRM system, aimed at boosting operational effectiveness and enhancing customer engagement. Furthermore, the chapter dives into the weaknesses identified through academic literature as well as those observed by the researcher experience. These insights are critical as they highlight the practical hurdles faced during the CRM implementation.

10. JCDecaux

JCDecaux was founded in 1964 by Jean-Claude Decaux, introducing the concept of advertising street furniture, starting with bus shelters that offered free services to municipalities in exchange for advertising space. The first installation in Lyon, France, set the foundation for a revolutionary business model in outdoor advertising. By 1966, the company expanded internationally, starting with Brussels. Throughout the 1970s, JCDecaux expanded its offerings, introducing backlit panels, self-cleaning public toilets, and digital signage, evolving to meet urban demands. Lisbon (1971) and Paris (1972) were early adopters of its innovative advertising solutions. Over time, the company became a hallmark of urban advertising, constantly innovating its products and services. By collaborating with designers like Sir Norman Foster and Philippe Starck, it elevated the quality of its street furniture, cementing its leadership in the industry. By 2011, it had secured its position as the world's largest outdoor advertising company, operating in over 56 countries (JCDecaux, 2024).

JCDecaux's activities circle around three core segments. Street furniture, including bus shelters, city information panels, and kiosks, combine advertising with public services, making this the company's most iconic division. In transport advertising, offers solutions across airports, metros, buses, and rail systems worldwide, maintaining contracts with cities such as Paris, Rome, and Sydney. The company's billboard advertising extends its reach further, using large format displays along major transit routes. Furthermore, it pioneered self-service bicycle schemes, such as the "Vélib'" system in Paris, solidifying its place as an integral part of urban life (JCDecaux, 2024).

As a leader in urban innovation, JCDecaux has consistently merged technology with advertising. In 1972, the company introduced back-lit panels, enhancing ad visibility. Its

1980 innovation of self-cleaning public toilets addressed urban hygiene, while the introduction of digital signage in Vienna's metro in 1998 marked a shift toward digital advertising. More recently, JCDecaux has partnered with tech firms to integrate small cells into its urban furniture, offering free Wi-Fi and aiding cities in their transformation into smart, connected environments (JCDecaux, 2024).

Its global network reaches 850 million people daily, across more than 80 countries, operating in over 4,000 cities with more than 10,000 inhabitants. Its presence crosses major urban centres in Europe, Asia-Pacific, North America, and the Middle East. In Europe, the company maintains a robust presence in cities such as Paris, London, and Rome. In Asia-Pacific, JCDecaux has expanded into Japan, Australia, and China, with the 2016 contract win in Tokyo underscoring its dominance in the region. Its entry into the U.S. market in 1994, starting in San Francisco, led to extensive growth across major American cities. It also made significant improvements in Africa, becoming the number one operator following its acquisition of Continental Outdoor Media in 2014 (JCDecaux, 2024).

Sustainability has been a cornerstone of its business model since its beginning. By providing free public services funded by advertisements, the company reduced the financial burden on municipalities. Today, integrates environmental, social, and governance strategies into its operations, focusing on eco-friendly designs, energy-efficient digital displays, and lowering its carbon footprint. Ethical standards are also deeply rooted in JCDecaux's corporate culture, with an emphasis on human rights, workplace diversity, and local community engagement (JCDecaux, 2024).

The company's operations are underscored by impressive figures. JCDecaux reaches 850 million people daily across 4,000 cities in more than 80 countries, with over 1 million advertising panels installed globally. Its workforce is comprised of over 13,000 employees representing more than 80 nationalities (JCDecaux, 2024).

JCDecaux's journey from a small operation in Lyon to the world's leading outdoor advertising company demonstrates its resilience and innovative spirit. By blending public service with advertising, the company has remained at the forefront of the industry for over 50 years. Its extensive network and continual investments in digital and sustainable technologies have positioned it as a central player in the smart city movement, ensuring that the company's influence will endure for decades.

JCDecaux Portugal, established in 1971, marked the company's first venture outside of a French-speaking country. Since then, JCDecaux Portugal has played a role in shaping the

urban landscape through innovative street furniture and advertising solutions. The company operates across various advertising platforms, including airports and malls, providing cutting-edge solutions that reflect JCDecaux's global values while adapting to the needs of the Portuguese market. Through its commitment to sustainability, urban mobility, and high-quality public services, JCDecaux Portugal continues to enhance the country's public spaces while maintaining strong partnerships with local municipalities, businesses, and citizens. Its presence in Portugal underscores the company long-standing dedication to providing sustainable and innovative urban solutions across the globe.

11. Pilot Project with Hubspot

The Inbound department played a crucial role in finding the necessity for change, serving as a catalyst for the broader CRM adoption across the organization.

It was the first to recognize the need for an effective system to manage their growing volume of customer interactions and leads. In 2022, it was initiated a pilot project using HubSpot, a widely recognized CRM platform known for its strengths in inbound marketing and lead management. This platform was chosen for its user-friendly interface and robust features designed to support inbound marketing efforts, such as content creation, social media engagement, and automated lead nurturing.

The decision to employ HubSpot's basic account was influenced by budgetary constraints and the strategic need to evaluate the platform before committing to a more extensive investment. Despite its limited features, the basic account provided an adequate framework to explore the CRM's potential and to integrate it into the existing strategies of a sales environment.

For almost a year, this department and Marketing, leveraged this platform to streamline their operations, centralizing customer data and automating routine tasks. According to the main user of the platform, that shared his experience, it suited and enhanced the growth of the department capabilities in providing a quick overview of the communication made previously, the history and the available data about the client. It was a challenge the data upload from excel to the platform, issues were raised from the compatibilities between the parameters existing on the sheet and the allowed ones in Hubspot. After several meetings with the IT, the information was adjusted to the platform's capability with a manual insertion. The possible loss of data was minimized with the adaptation of the fields provided by the platform to the ones in the Excel file.

The sales team was now able to timeline communications more accurately, schedule follow ups and meetings as a reminder, being generated alerts in the intended days to help organize the daily tasks and routines. This brought an anticipation capability not existed until that time.

One of the primary insights gained was the effectiveness of its intuitive interface and its ability to centralize lead information from the company's website forms. This functionality offered a significant improvement over the traditional reliance on a combination of spreadsheets and disconnected tools, which often lacked the integrated view necessary for an efficient inbound strategy.

However, the simplicity of the basic account introduced challenges. The absence of advanced functionalities such as marketing automation and custom reporting demanded manual processes, which in a fast-paced and competitive industry, could hold back scalability and operational efficiency.

Additionally, the lack of more sophisticated integrations raised challenges in aligning marketing and sales teams effectively. This gap highlighted the need for creative problem-solving and the usage of supplementary tools to address these shortcomings.

The experience of working with HubSpot's basic account provided valuable insights into the strategic use of limited resources. It underscored the importance of maximizing available features and exploring all possibilities within the CRM. A deeper understanding was gained regarding the structuring of sales pipelines and the effective mapping of the customer journey, despite the absence of more advanced tools.

This also emphasized the value of the inbound methodology, which focuses on creating content and offers that attract the right leads and traffic to the website. The constraints made it evident that every interaction with a lead needed to be highly relevant and calculated, thus reinforcing the importance of quality over quantity in lead generation.

The testing period offered crucial insights into the management of CRM tools with limited functionalities. While the tool did not provide all the desired features, it imposed a more strategic approach, ultimately fostering a deeper understanding of how to achieve more with less. This experience also highlights the importance of building a strong foundational knowledge, which could be leveraged when transitioning to more advanced CRM solutions.

The insights gained from this case study underscore the significance of adaptability and scalability in the development of sales and inbound strategies. The foundational experience with a basic CRM tool prepares professionals for future challenges and equips

them with the necessary skills to lead effective inside sales and inbound marketing teams, both locally and on an international scale.

It was recognized, by the management, the limitations of HubSpot and advocated for the adoption of a different CRM, Salesforce, already in use in some countries, providing a more versatile and powerful CRM platform capable of supporting the diverse needs of the organization. Their ability to demonstrate tangible benefits, such as improved lead management, enhanced customer engagement, and increased operational efficiency, provided a compelling case for investing in a more comprehensive CRM solution.

12. The Evaluation Process

The HubSpot trial between May 2022 and May 2023, served as a valuable case study, showing the potential advantages of a CRM and highlighting the importance of a unified approach to customer relationship management. The department's experiences helped to build a strong business case for Salesforce, facilitating broader organizational buy-in and support for the CRM implementation project.

By demonstrating the value of CRM technology in a controlled environment, the test was able to highlight the benefits and address potential challenges, setting a precedent for a larger scale usage. This approach not only helped to mitigate risks associated, but also fostered a culture of innovation and continuous improvement within JCDecaux Portugal. The insights gained from the Inbounds experience informed the planning and execution of the Salesforce implementation, ensuring that the transition was aligned with the company's strategic objectives and operational needs.

The evaluation process for a new CRM system was driven by insights gathered from the usage and experience in other countries as well as the Inbound testing. Key considerations included the ability to support extensive data integration, advanced analytical capabilities, and flexibility to customize workflows and processes to fit JCDecaux's unique business model. The need for a system that could enhance not just sales and marketing alignment but also improve operational efficiency across departments was vital.

CHAPTER IV – METHODOLOGY AND CASE CONTEXT

This study adopts an action research methodology to explore and facilitate the integration of Salesforce CRM at JCDecaux Portugal, focusing on the collaborative development and refinement of processes. It is a participatory and iterative method that involves stakeholders directly in the research process. It is designed to address real-world problems through cycles of planning, acting, observing, and reflecting (Cohen, Manion, & Morrison, 2007). This methodology is particularly suitable for organizational change studies, such as this one, where the involvement and collaboration of stakeholders are crucial for success.

Action research differs from traditional research methodologies by its focus on solving practical issues while simultaneously contributing to academic knowledge. It combines the dual aims of taking action to bring about change and conducting research to understand the underlying dynamics of this change. This approach ensures that the research findings are not only theoretically robust but also practically relevant and actionable (Davison, Martinsons, & Kock, 2004).

The approach used, allowed for continuous feedback and iterative improvements throughout the CRM implementation process. This not only helped the identification and resolution of challenges but also contributed to the development of best practices and guidelines for future cases.

It provided a framework for studying the implementation at JCDecaux Portugal, enabling the creation of practical insights and actionable recommendations for improving customer relationship management practices.

As investigation instruments it was used group meetings and a survey made in Google Forms.

Group meetings were essential in gathering qualitative data. It involved representatives from different departments such as marketing, sales, and patrimony, coordinated by the IT team. These were held to discuss the specifics of CRM and the unique requirements of each team.

The primary aim was to ensure that the system met the various needs of each department. By involving key stakeholders in the discussion, the implementation team could gather insights into departmental workflows, pain points, and expectations. These were helpful in shaping the customization and ensuring user-centric design.

13.Data Analysis Methodology

The data analysis methods employed are essential to understand this study. By employing both thematic and statistical analysis techniques, the research aims to provide an understanding view of the CRM system's impact and the user experience.

Qualitative data analysis was primarily used to understand the valuable, detailed feedback gathered from group meetings. This approach allowed a deep understanding of participants' experiences, opinions, and suggestions. Thematic analysis was chosen as the primary method for qualitative data analysis due to its flexibility and detailed approach to identifying patterns within the data. According to Braun and Clarke (2006), thematic analysis involves familiarization with the data, generating initial codes, searching for themes, reviewing themes, defining and naming themes, and writing up the results. This process ensured that the diverse perspectives of different departments were carefully analysed and integrated into the findings. In the context of thematic analysis, "codes" are labels or tags that assign a meaning to small portions of data, such as phrases, sentences, or paragraphs. These codes help in categorizing data into different themes, which are wider patterns that represent significant concepts or ideas relevant to the research questions. Finally, selective coding was used to identify core categories and relate them systematically to other categories, providing a coherent narrative of the CRM implementation process and its challenges (Strauss & Corbin, 1990).

Quantitative data analysis complemented the qualitative insights by providing a statistical overview of the user experiences and system performance gathered from the survey. Descriptive statistics were used to summarize the data, including measures of central tendency such as mean, median, and mode, as well as measures of dispersion like range, variance, and standard deviation. These statistics provided a clear picture of overall user satisfaction and highlighted specific areas of concern. Inferential statistics were then employed to draw conclusions from the survey data and generalize the findings to the broader user population. Techniques such as hypothesis testing, confidence intervals, and regression analysis were used to explore the relationships between different variables and to test the significance of the findings (Field, 2013). Additionally, correlation analysis was conducted to examine the relationships between various factors, such as the ease of use and user satisfaction, to identify significant trends and patterns.

CRM system reports provided further quantitative data on user engagement and system performance. Metrics such as user login frequency, task completion rates, and data entry

accuracy were analysed to assess the system's effectiveness in improving workflow and productivity. User login frequency tracked how often employees logged into Salesforce, offering insights into adoption rates and engagement levels. Task completion rates measured the percentage of tasks completed by users, helping to evaluate the system's impact on efficiency. Data entry accuracy was assessed by comparing the data input into Salesforce with existing records, ensuring the integrity and reliability of the data migrated to the new system.

14.Limitations of the Study

Despite the insights gained from this research on the CRM implementation at JCDecaux Portugal, there are innate limitations that should be acknowledged to provide context and to frame the interpretation of the findings accurately. Understanding these limitations helps clarify the scope and applicability of the study's conclusions.

Biases are an inherent part of any research process and can significantly affect the legitimacy and reliability of the findings. In this research, some potential biases were identified and addressed where possible.

- Selection Bias:
 - The study relied on participants from within JCDecaux Portugal, primarily those involved in the CRM implementation process. This selection may not fully represent the views of all users or stakeholders affected by the CRM system.
- Response Bias:
 - Participants may have provided responses that they believed were expected or desirable, particularly in a corporate environment where discussions are linked to organizational change and performance. This could have resulted in an overestimation of the system's effectiveness or a restraining of challenges and issues. Efforts were made to minimize this bias by ensuring anonymity in survey responses and encouraging open, honest feedback during group meetings discussions.
- Researcher Bias:
 - As the researcher is also a user, there was a risk of inherent bias in interpreting the data and findings. Familiarity with the organization and its processes could influence the objectivity of the analysis. To mitigate this,

the research design included triangulation of data sources and methods to cross-verify findings and reduce the impact of personal bias on the conclusions (Patton, 1999).

Action research, while valuable for its participatory and iterative approach, presents several limitations that had to be considered.

This type of research focuses on specific problems within a particular context, which in this case is the CRM implementation at JCDecaux Portugal. The findings, therefore, may not be easily generalizable to other organizations or contexts. What works in one setting may not be valid in another due to differing organizational cultures, structures, or external environments (Avison, Lau, Myers, & Nielsen, 1999).

Its success heavily depends on the active involvement and cooperation of users. In this case, the level of engagement varied across departments, which may affect the richness and depth of the data collection. Departments that were more engaged in the CRM implementation process provide more detailed and useful feedback compared to those with lower involvement.

The iterative nature of action research means that findings evolve as the research progresses. This can lead to a lack of a clear termination or definitive conclusions, as the research is designed to adapt and respond to ongoing changes within the organization. This uncertainty can complicate the analysis and reporting of findings, making it challenging to capture a complete and final picture of the CRM implementation process. These limitations highlight the challenges inherent in conducting organizational research, particularly in a dynamic and complex environment like JCDecaux Portugal. Recognizing these limitations is crucial for contextualizing the findings and for guiding future research and implementation efforts. The next section will provide a detailed case study of the CRM implementation process, outlining the steps taken, challenges encountered, and lessons learned.

15. The CRM System

The search for a new CRM system was guided by strategic considerations drawn from the experience with HubSpot and an in-depth understanding of the company's unique operational requirements. According to the experience gained with local testing and from other countries in the group with other levels of implementations in these systems, the desired one needed to offer:

- Advanced Customization: To accommodate JCDecaux's diverse product offerings and sales processes, enabling personalized customer journeys and tailored marketing campaigns.
- Robust Data Analytics: For generating actionable insights into customer behaviour, campaign performance, and market trends, supporting data-driven decision-making.
- Unified Integration: With internal and external systems, ensuring a cohesive technology ecosystem that enhances operational efficiency and data accuracy.
- User-friendly Interface: Encouraging high adoption rates across departments by providing an intuitive user experience and simplifying complex processes.

Salesforce stood out as the CRM platform that best aligned with JCDecaux's strategic needs. Its proven track record in scalability and integration, combined with the platform's extensive customization options and powerful analytics capabilities, made it an ideal choice. Salesforce's ability to adapt to the specific requirements from sales and marketing to patrimony, promised a holistic solution that could drive the company towards its digital transformation goals. Also, the company had already adopted this tool in other countries, Italy in 2014, Mexico and Panama in 2021, with different features. This implementation in Portugal, alongside Spain is to test a total system and procedures integration using a CRM, to make it a standard implementation in the group worldwide.

The architectural development for Salesforce within JCDecaux Portugal was informed by an analysis of the company's operational workflows and customer management processes. This analysis was made by having meetings and discussions around the daily routine workflow of each of the involved departments. The integration strategy was designed to ensure a seamless flow of data between Salesforce and existing systems, enabling a unified view of customer interactions and enhancing data integrity. Custom modules and workflows were developed to support the specific needs of different departments, from sales and marketing to patrimony, ensuring that Salesforce could accommodate the intricate dynamics of JCDecaux's business operations.

The transition plan for was data-driven, leveraging insights from HubSpot's usage and feedback from key users to inform system customization and workflow optimization. The goal was to create a CRM environment that was not only robust and scalable but also aligned with user expectations and business processes, ensuring a high degree of usability and adoption across the organization.

The evaluation of HubSpot's deficiencies, not only emphasised the need for enhanced scalability and integration capabilities but also underscored the importance of a CRM system that could support the complex, multi-layered nature of JCDecaux's business operations.

Furthermore, integration capabilities, or the lack of them, presented significant challenges. This was crucial for maintaining data integrity, ensuring real-time data access, and facilitating a unified approach to customer management.

16. Rollout Planning and System Architecture Development

The implementation to be successful, required aligning several departments with distinct operational needs and objectives under a unified vision for the integration. This collaborative effort underscored the multifaceted nature of these systems, which, are not merely technological tools but organizational innovations requiring broad-based support to achieve full integration.

Developing a CRM architecture that catered to the nuanced requirements of each departments needed a thorough understanding of their workflow, customer interaction patterns, and data management needs. Kotter (1996) highlights the importance of engaging a broad range of stakeholders in organizational change initiatives, noting that successful change efforts often start with a partnership that understands the change's necessity and has the power to lead the organization through the transition. In this case, involving representatives from sales, marketing, patrimony, and IT in the process ensures that Salesforce is aligned with the operational reality and needs.

Effective communication was vital to synchronize efforts across departments and ensure that all stakeholders had a clear understanding of the objectives, capabilities, and the benefits of the usage of the CRM. According to Parvatiyar and Sheth (2001), establishing open channels of communication and fostering a culture of collaboration are critical in managing customer relationships effectively and achieving the system objectives. Regular progress meetings were held, project dashboards and feedback were shared, and collaborative workshops were made to facilitate a culture of transparency and collective ownership of the process.

This collaboration extended beyond planning into the iterative enhancement of the CRM system. At JCDecaux Portugal, feedback from each representative was key in

customizing Salesforce features, from dashboard configurations to report templates, ensuring the system was responsive to the actual needs of users across the organization. The cross-departmental collaboration ultimately culminated in the development of a unified CRM vision that recognized the strategic importance of Salesforce as a tool for enhancing customer engagement, streamlining sales processes, and driving operational efficiency. This collective overview is crucial in ensuring that CRM systems are leveraged effectively to enhance customer value and achieve competitive advantage. The development of Salesforce architecture at JCDecaux Portugal was a meticulous process, designed to ensure that the CRM system would not only meet current operational needs but also be scalable for future demands.

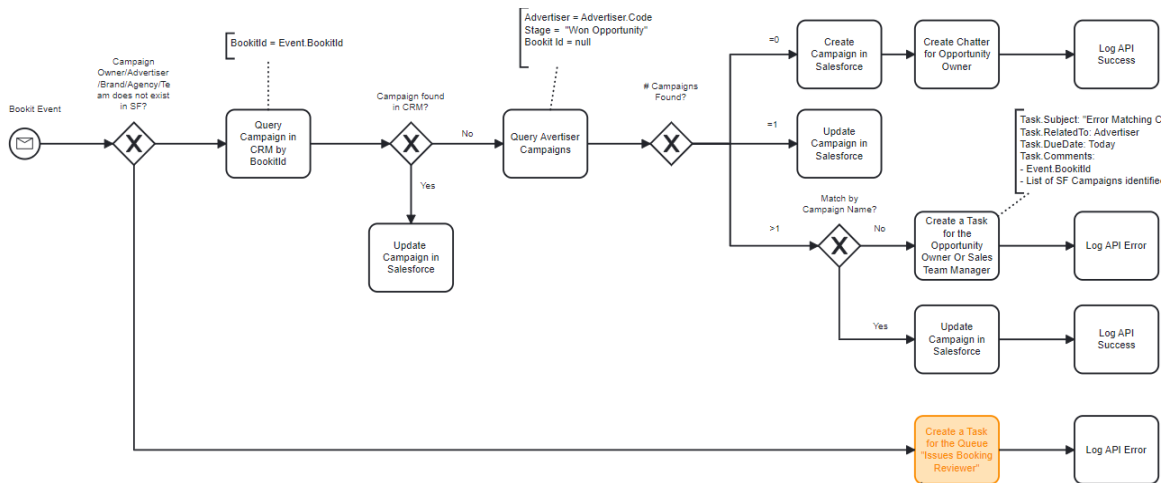


Figure 1 – CRM Architecture (JCDecaux, 2023)

Salesforce's architecture was developed with an emphasis on customization and flexibility, reflecting JCDecaux's diverse range of services and customer interaction points. It involved aligning with the organization's vision and strategic objectives. It was tailored to support the company's unique business model, including custom modules for managing advertising campaigns, client interactions, and analytical reporting as seen in figure 2. This customization ensured that it could adequately support the complex dynamics of the advertising industry, where customer data and campaign metrics are vital.

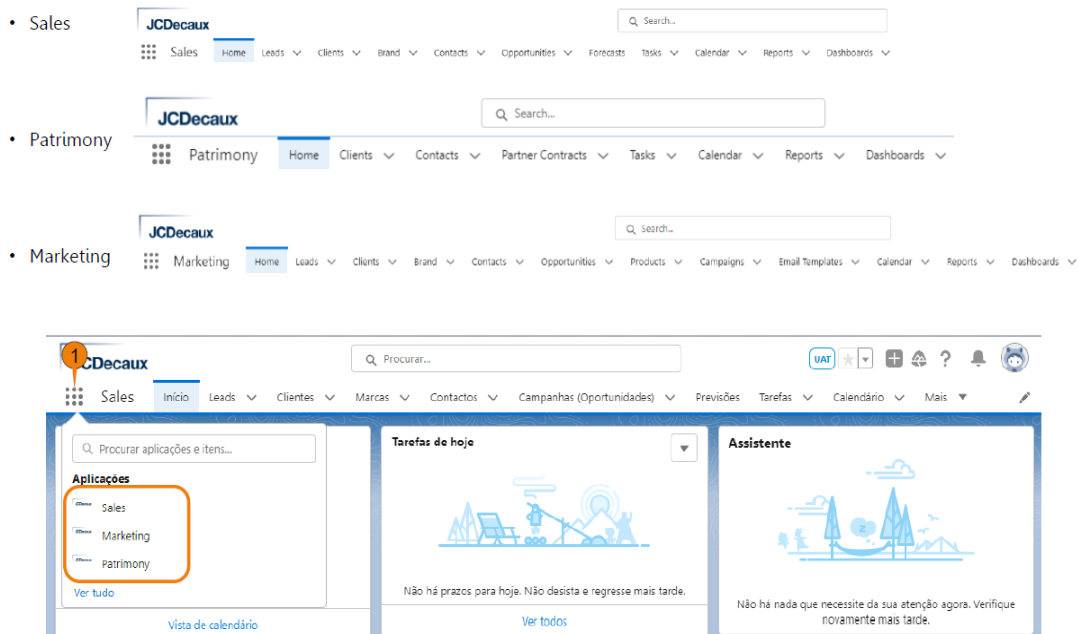


Figure 2 - Final Navigation Menu in Salesforce (JCDecaux, 2023)

The upper figure 2, visually represents the customized modules developed, showing the system's architecture results and how different modules interconnect to support business operations.

A critical aspect was the integration with existing systems. This was vital for maintaining data integrity and ensuring a seamless flow of information across platforms. Rogers (2003) highlights the significance of integration in the diffusion of innovations, noting that the seamless incorporation of new technologies into existing infrastructures is crucial for adoption and effectiveness. Salesforce was integrated with internal systems to automate data synchronization, reducing manual data entry and enhancing operational efficiency.

The image in figure 3 and annex 2, details the processes involved in managing non-commercial clients integrated system, which incorporates Salesforce alongside other critical business management software. This workflow is meticulously designed to streamline the handling of client data from initial data collection through to the final stages of billing and invoicing, ensuring a seamless and cohesive operational flow.

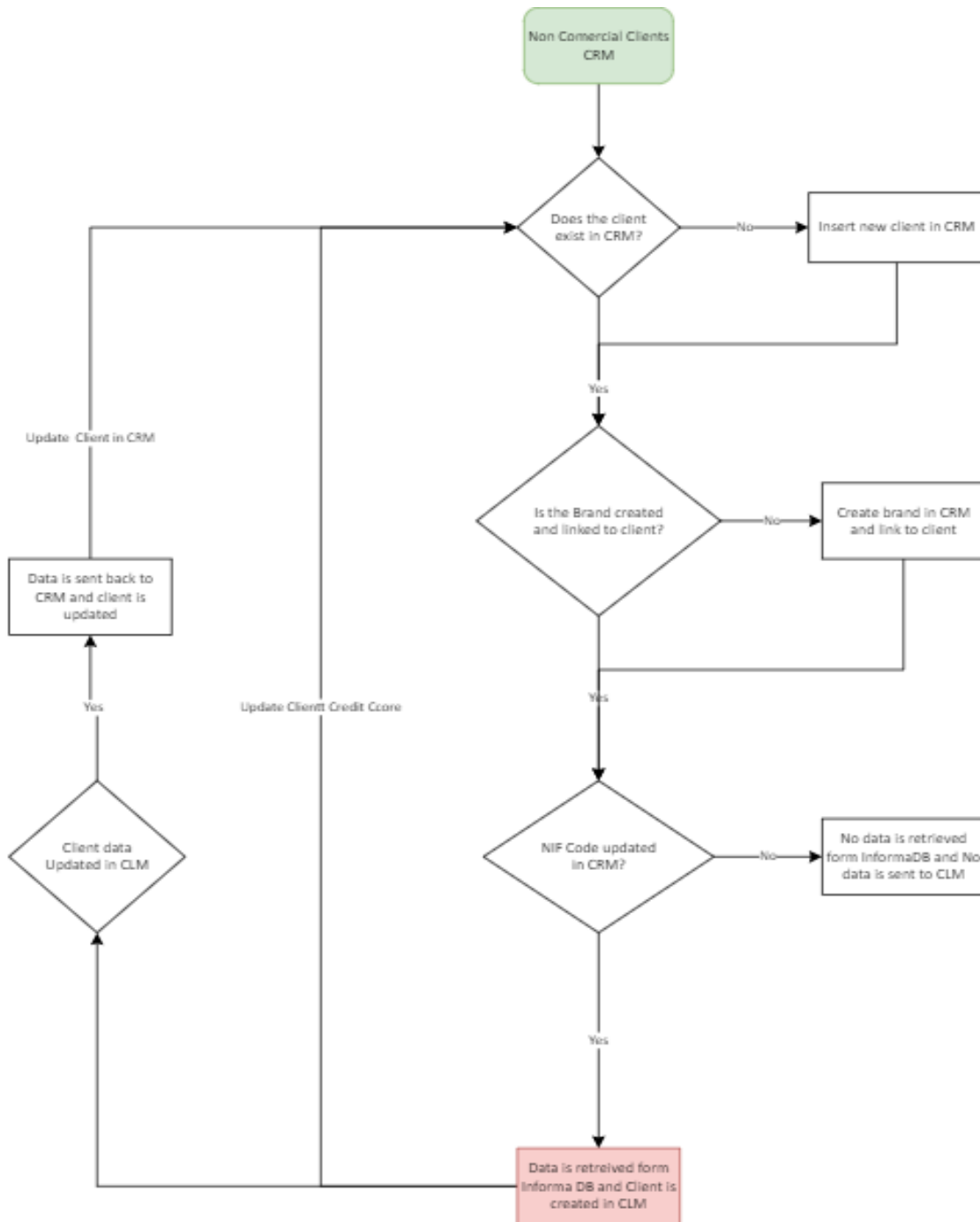


Figure 3 - Integration of a system in the Salesforce platform (JCDecaux, 2023)

This detailed workflow captures several critical stages—from initial client engagement to final billing—underpinned by a series of confirmations and updates that ensure a streamlined sales process.

Figure 4 highlights the integration with other systems. Salesforce provides a platform for managing all client-related activities, from initial contact through to final invoicing, exemplifying a well-orchestrated approach to CRM-enabled sales management.

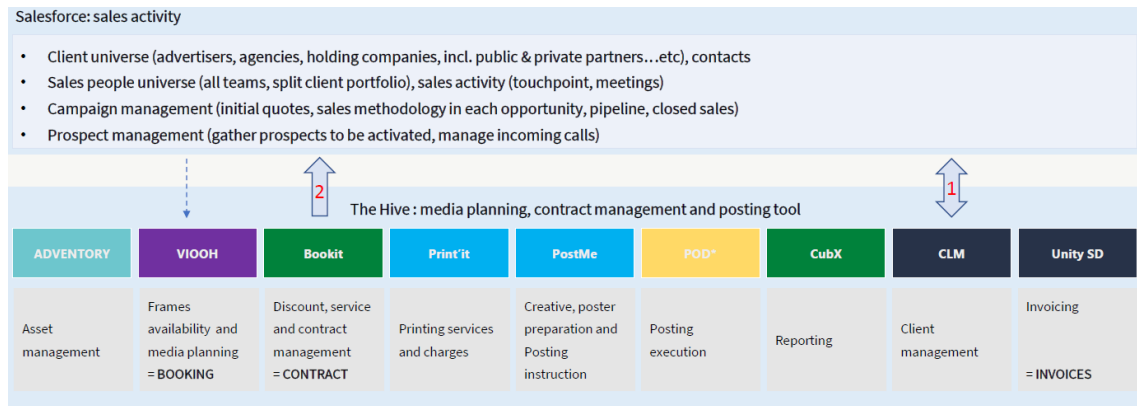


Figure 4 - Interaction between Salesforce and other systems (JCDecaux, 2023)

The architecture was also made by a user-centric design philosophy, recognizing the importance of user engagement and adoption. JCDecaux prioritized the creation of an intuitive user interface and customizable dashboards, ensuring that users from different departments could easily access relevant information and tools. This approach facilitated higher user adoption rates and fostered a positive attitude towards the new CRM system. Figure 5 showcases the Salesforce dashboard used, which features a global search box, quick actions for each object, list views with filters, and a detailed record listing. These elements demonstrate the dashboard's capability to provide users with a swift and efficient way to navigate the system, access information, and manage tasks. Each aspect of the dashboard was designed to ensure that they can quickly adapt to the new CRM environment, supporting a wide range of functions from lead management to client contact and campaign oversight.

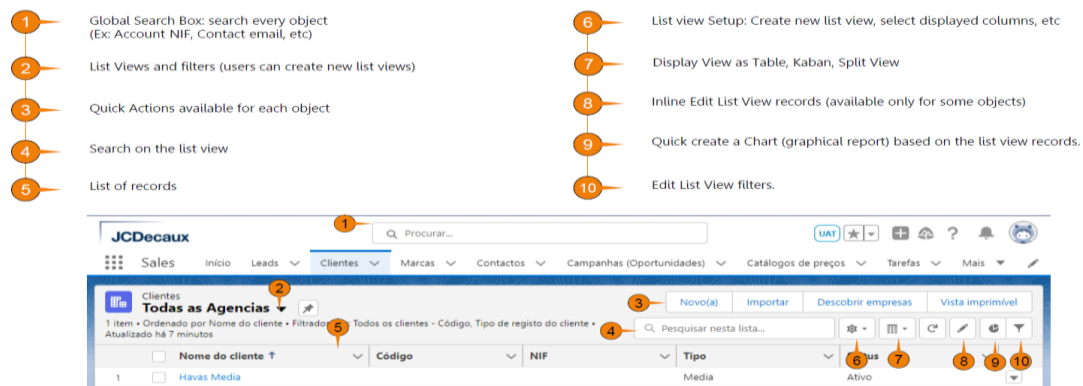


Figure 5 - Global Search & List View (JCDecaux, 2023)

Figure 6 in below, explores the 'Activities' panel within Salesforce, highlighting essential features such as logging calls, setting up new tasks and events, and sending emails directly from the platform. The timeline view offers users a chronological visualization of all activities related to a record, while the integrated Outlook functionality indicates a seamless connection between Salesforce and external communication tools. This panel simplifies the daily activities of sales representatives, enabling them to manage their workflow more effectively and focus on delivering personalized client experiences.

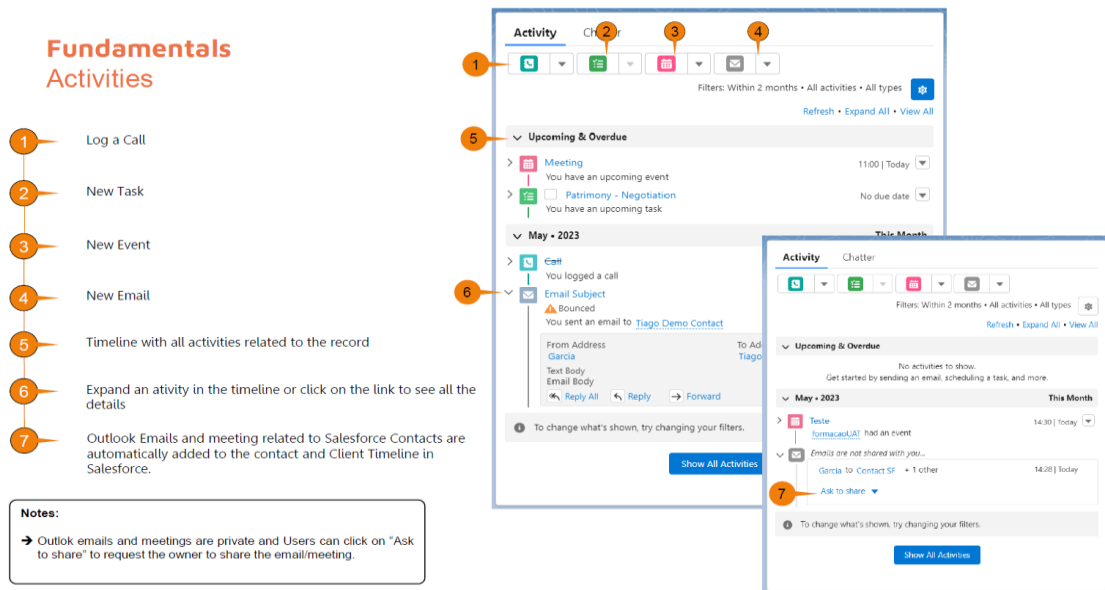


Figure 6 - Fundamental Activities (JCDecaux, 2023)

The user-centric design extends beyond these functional aspects, incorporating feedback mechanisms that allow for continuous system improvement. This approach not only enhances current operational efficiency but also paves the way for future expansions and upgrades.

The architecture was designed with scalability in mind, anticipating future growth and the potential for incorporating additional functionalities. Peppers and Rogers (2016) discuss the importance of scalability in CRM systems, highlighting that the ability to adapt to changing business environments and customer needs is crucial for long-term success. JCDecaux's Salesforce architecture was accordingly developed to be adaptable, ensuring that the system could evolve in line with the company's strategic growth and the dynamic nature of the advertising industry.

The "Go Live" phase represents a decisive moment in the CRM implementation journey, marking the transition from meticulous planning and preparation to active system deployment. This critical juncture not only means the culmination of extensive efforts in system setup and customization but also initiates the real-world use and integration of Salesforce into the company's daily operations. The success of this phase hinges on effective data migration, robust system testing, and comprehensive user training, ensuring that the CRM system is seamlessly integrated into the existing business processes and readily adopted by the users. Figure 7 highlights the initial project timeline schedule, that had several adjustments made until this final stage.

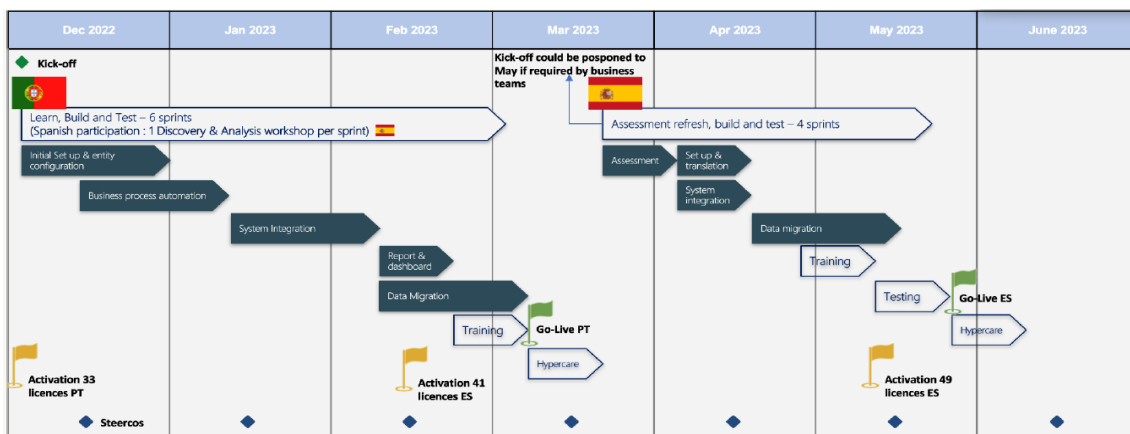


Figure 7 - Initial Project Timeline (JCDecaux, 2023)

The transition to Salesforce began with initial planning meetings in December 2022, involving key stakeholders from various departments, including marketing, sales, and IT. These meetings aimed to align the CRM capabilities with the company's operational requirements and set the stage for a smooth transition. The planning phase also involved defining the scope of the implementation, setting up timelines, and identifying potential challenges.

The Go Live phase, officially started in June 2023, following months of intensive preparation. This included the data migration processes, where existing customer data from various sources was consolidated into Salesforce. Ensuring data accuracy and integrity was a significant focus, as it was crucial for maintaining the reliability of the CRM system. System testing was conducted to identify and resolve any potential issues, ensuring that Salesforce was fully operational and ready to handle the demands of JCDecaux's business processes.

A key component of this phase was user training. Comprehensive training sessions were held to familiarize users with the new system, focusing on essential functions and workflows. These sessions aimed to build user confidence and competence, ensuring that users were well-equipped to use Salesforce effectively from day one. The training also included practical exercises and real-world scenarios to help users understand how the system could enhance their daily tasks.

Despite thorough preparations, it presented several challenges. Technical issues, such as system slowdowns and bugs, were encountered as users began interacting with it. These issues were promptly addressed by the IT team to minimize disruptions. Additionally, some users experienced difficulties adapting to the new system, highlighting the importance of ongoing support and additional training to address specific concerns and ensure a smooth transition.

The figure 8 bellow, illustrates the framework for CRM implementation, divided into four distinct phases: Overview & Structure, Pillars Deep Dive, Set Up, and CRM Guide. Each phase was designed to ensure a structured approach to the integration, aligning with pre- and post-project implementation activities. It provides a holistic approach, ensuring that each phase is thoroughly planned and executed. It emphasizes the importance of understanding the CRM's core components, detailed planning for data integration and system configuration, and continuous improvement post-implementation.

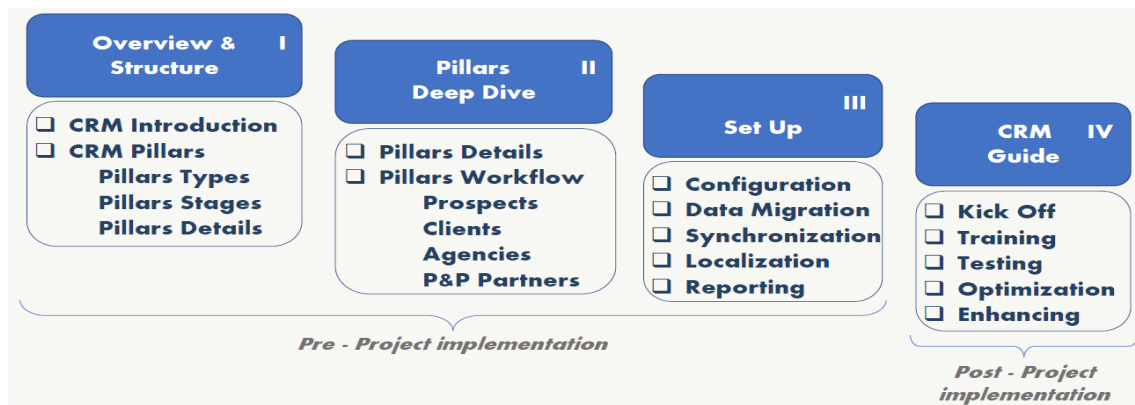


Figure 8 - Project Implementation Phases (JCDecaux, 2023)

All departments involved, established a feedback loop, gathering insights from users and communicating these to the IT department for ongoing system enhancements. This process of ensured that Salesforce remained responsive to the evolving needs of the business and its users. Bala and Venkatesh (2007) note that feedback loops are essential

for iterative technology development, enabling organizations to adapt and refine systems in alignment with user needs and business goals.

Despite the strategic planning and enthusiastic initiation of Salesforce CRM at JCDecaux Portugal, the early adoption phase was not without its challenges. These difficulties were instrumental in refining the implementation strategy, showcasing the resilience and adaptability of teams.

One of the primary challenges was user resistance, a common obstacle in the adoption of new technologies within organizations. The shift from HubSpot to Salesforce represented a significant change in daily workflows for many employees. To mitigate this resistance, the company focused on demonstrating the tangible benefits of Salesforce, aligning its features with individual and departmental goals to foster a more positive attitude towards the change.

Another challenge was the variability in user proficiency with the new CRM system. The depth of Salesforce's features, while a significant advantage, also meant a more longer learning curve for some of them. Training programs, as discussed by Lemon and Verhoef (2016), were essential in reducing this gap. However, adapting these programs to cater to diverse learning paces and styles required JCDecaux Portugal to adopt a more flexible approach to training and knowledge sharing.

The extensive customization capabilities of Salesforce, though a key factor in its selection, also introduced complexities in the system's initial configuration. Tailoring the CRM to meet the specific needs of different departments within JCDecaux Portugal needed a considerable investment of time and resources. Singh and Singh (2020) highlight the importance of balancing customization with usability, ensuring that CRM systems enhance rather than complicate user workflows.

CHAPTER V – RESULTS AND FINDINGS

The purpose of analysing the results is multi-layered. Firstly, it aims to provide an understanding of the integration into daily business operations and how effectively it supports the company's objectives. This includes examining user engagement levels, the efficiency of system functionalities, and the overall satisfaction of the users who interact with it on a regular basis.

Additionally, user experiences have been assessed, particularly focusing on comparing Salesforce CRM with HubSpot, the previous platform used by JCDecaux Portugal. Specifically, the analysis takes into consideration the experiences of the inbound executive (myself) and the marketing department, both of whom previously used HubSpot. This evaluation included whether users found Salesforce CRM to be more useful and advantageous compared to HubSpot, providing insights into user perspectives and perceived benefits of the system.

Secondly, the analysis seeks to identify any challenges or issues encountered during the implementation and use of the platform. By understanding these challenges, the study aims to offer insights into how similar issues can be mitigated in future CRM projects.

The findings are intended to offer actionable recommendations for enhancing CRM strategies. They also provide valuable lessons that can inform future implementations within the organization and serve as a reference for other companies undergoing similar digital transformation efforts.

To ensure its reliability and legitimacy, data analysis was employed. This involved comparing and cross-verifying data from multiple sources and methods. By integrating the qualitative insights from meetings and observations with quantitative data from the survey, the study was able to provide a comprehensive understanding of the implementation process at JCDecaux Portugal. This method helped to corroborate findings, identify patterns, and enhance the overall credibility of the research (Patton, 1999).

17. Analysis and Results

The survey conducted for this study was based in the System Usability Scale (SUS) methodology, a tool for evaluating the usability of various systems, including software applications like CRM systems. The SUS is a widely recognized method developed by John Brooke in 1986 to provide a quick and reliable means to measure usability across a wide range of products and services (Brooke, 1996).

The primary reason for choosing this methodology lies in its proven effectiveness and reliability. It offers a balanced approach to gathering user feedback, capable of providing a quantitative measure of usability that is both easy to interpret and actionable. Is particularly valuable because it can be administered quickly, is easy for participants to understand, and produces results that are simple to analyse and interpret (Brooke, 2013). Its adaptability to different contexts and systems makes it an ideal choice for evaluating the usability of the Salesforce CRM within JCDecaux Portugal.

Applying it was essential for several reasons. Firstly, it enabled the collection of standardized data on user's experiences and perceptions of the CRM system. This is particularly important in understanding how well the system meets the needs of different user groups within the company, from sales and marketing teams to customer service representatives.

Secondly, the SUS provides a benchmark for comparing usability across different systems or iterations of the same system. By employing this methodology, the data gathered aimed to determine the usability of Salesforce, and to identify areas where improvements could be made. This comparative analysis is essential for assessing the effectiveness of the CRM transition and guiding future enhancements.

Moreover, its ability to produce a single, composite score summarizing overall usability makes it an efficient tool for capturing a snapshot of user satisfaction. This score, obtained from the aggregated responses, provides a clear indication of how users perceive the system's ease of use, functionality, and overall performance. Such a measure is invaluable for identifying trends and issues that might not be immediately apparent from qualitative feedback alone.

The survey comprised 10 questions: 9 used a Likert scale, and the 10th was an open-ended answer, designed to stimulate users' views on various aspects of the CRM, from its interface design and functionality to its impact on their daily tasks and overall satisfaction. These questions were tailored to capture the nuances of user experiences with the Salesforce CRM, providing insights into both the strengths and weaknesses of the system as implemented at JCDecaux Portugal.

The 5-point Likert scale, ranged from 1 (strongly disagree) to 5 (strongly agree). Likert scales are widely used for usability assessments because they provide an intuitive and easy-to-use mechanism for participants to express their perceptions (Likert, 1932; Boone & Boone, 2012). This scale makes the SUS an ideal tool for capturing users' impressions

and opinions, allowing researchers to assess usability effectively. A higher score indicates a positive user perception in terms of ease of use, efficiency, and overall satisfaction.

The survey included 29 participants, consisting of key stakeholders who directly interacted with Salesforce at JCDecaux Portugal. This group included representatives from the sales, patrimony and marketing teams, also the previously users of HubSpot. This structure allowed to gather insights from various functional areas to provide a holistic view of system usability.

It aimed to get information about user experiences, including system usability, feature satisfaction, and perceived impact on workflow efficiency. Questions were designed based on the Unified Theory of Acceptance and Use of Technology (UTAUT) to assess factors influencing CRM adoption. The SUS method was employed to evaluate the usability of Salesforce, providing a reliable, low-cost usability scale that can be used for global assessments of system usability (Brooke, 1996). The survey was originally in Portuguese and translated to English. Annex 1 presents the questions along with the objective of each one. The survey results, presented in table 4, provide an overview of user feedback regarding the usability and functionality of the Salesforce CRM platform.

Question	Mean	% 4 and 5
1. How do you rate the ease of navigating Salesforce?	3.62	62%
2. Does Salesforce provide all the necessary information for your work?	2.86	28%
3. Do you find it easy to customize Salesforce to your specific needs?	3.07	34%
4. Do you feel productive using Salesforce?	3.00	24%
5. Is the technical support for Salesforce adequate and easily accessible?	3.59	52%
6. Do you frequently encounter technical problems using Salesforce?	2.76	28%
7. Was the training provided for Salesforce sufficient for efficient use of the system?	3.62	66%
8. Would you recommend Salesforce to a new employee in the company?	3.31	41%
9. Does Salesforce facilitate collaboration between teams?	3.00	38%

Table 4 – User feedback regarding Salesforce CRM usability and functionality

The first question aims to evaluate the user-friendliness of the Salesforce platform, focusing on its ease of navigation. This question is essential, because user experience plays a critical role in the successful adoption of CRM systems. A platform that is easy to navigate can significantly enhance user satisfaction, reduce training time, and improve overall productivity.

Most users rated the ease of navigating Salesforce positively, with a high percentage of 4 and 5 scores (62%), suggesting that the platform is generally perceived as user-friendly. However, the mean 3.62 suggests some areas for improvement.

The absence of a rating of 1 is a positive indicator, suggesting that no users found the navigation extremely difficult. This reflects well on the overall design and usability of the Salesforce interface, although the data highlights the need for targeted improvements to address the concerns of users who find it less intuitive.

The following question (2) seeks to evaluate whether Salesforce equips users with all the critical information they need to perform their tasks effectively. This is a vital aspect of CRM system implementation, as the main objective is to centralize and streamline access to customer information and other essential data. Evaluating the adequacy of information provision is crucial for understanding how well the system supports the workflow and decision-making processes of the users.

The answers to this question, reveal a range of opinions on the adequacy of information provided by Salesforce.

The survey results indicate that a significant portion of users (69%) gave a mid-range rating (2 or 3) to the question of whether Salesforce provides all the necessary information for their work. This suggests that while the platform provides a substantial amount of the required information, there are notable gaps that need to be addressed to fully meet user needs.

The low percentage of rating 4 and 5 (28%) indicates that users feel there is room for improvement in how Salesforce provides and organizes information. This feedback is crucial for identifying specific areas where the platform may fall short, such as the comprehensiveness of the data available or the ease with which users can access it.

The third question assesses the ease with which users can tailor Salesforce to meet their specific needs. Customization is a critical aspect of CRM systems, allowing businesses to adapt the platform to their unique workflows and requirements. Evaluating this aspect helps in understanding how flexible and user-friendly the system is in supporting the diverse needs of its users.

The answers to this question, indicates varying levels of satisfaction with Salesforce's customization capabilities.

The survey results highlight that while most users find Salesforce moderately too easy to customize, there is a notable minority that experiences challenges in this area. The mean of 3.07 reveals that the respondents suggest that for some of them, customizing Salesforce to fit specific needs is not straightforward.

The feedback suggests that while Salesforce offers significant customization capabilities, there may be barriers such as complexity or a lack of user-friendly customization tools that hinder some users from fully utilizing these features.

The next question (4) aims to assess users' perceptions of their productivity when using Salesforce. Productivity in the context of CRM usage is critical as it directly impacts the efficiency of business processes and the overall effectiveness of the system in helping daily tasks. Understanding how productive users feel can highlight its role in streamlining operations and reducing time spent on administrative tasks.

The answers to this question reveal a mixed sentiment regarding productivity.

The data shows a mean score of 3.00, with only 24% of users rating their productivity as 4 or 5. This indicates that while some users find Salesforce helpful in improving their work efficiency, a majority may experience limitations within the platform that impact their ability to be fully productive.

On the other hand, the 24% of users who rated their productivity positively suggests that certain features or functionalities within Salesforce do enhance productivity for a subset of users. This feedback highlights the need to study specific areas of the platform that might delay optimal productivity and to explore targeted improvements that could help all users achieve greater efficiency.

The fifth question is designed to evaluate users' satisfaction with the technical support provided for Salesforce. Effective technical support is crucial for ensuring that users can resolve issues quickly, maintain productivity, and fully use the CRM's capabilities. Adequate support systems not only facilitate the resolution of technical issues but also enhance the overall user experience and system reliability. By identifying areas where the support system may need improvements, this evaluation helps in optimizing the CRM implementation to better meet user needs.

The replies to this question reflect a generally positive sentiment towards the technical support provided, with a few areas of concern. With a mean score of 3.59 and 52% of users rating the support as 4 or 5, the data suggests that over half of the respondents feel

that the support provided is adequate and meets their needs. This high rating indicates that many users can access the help they require, which contributes positively to their overall experience with Salesforce.

However, for those who rated their satisfaction below 4, there may be specific support aspects that could be enhanced. Improving the accessibility, responsiveness, or depth of support could further increase user satisfaction, ensuring that all users feel adequately supported in their interactions with Salesforce.

The next question (6) aims to understand the frequency of technical issues experienced by users when interacting with Salesforce. Assessing these technical challenges is crucial for evaluating the platform's reliability and user-friendliness. Frequent technical problems can block productivity and lead to dissatisfaction among users, negatively impacting the adoption and effective use of the CRM system. By identifying the frequency of these issues, JCDecaux can spotlight areas for technical support and system improvements to enhance overall user satisfaction and system efficiency.

The replies to this question reveal a range of experiences regarding technical issues. The results show a mean score of 2.76, with only 28% of respondents rating their experience as 4 or 5, indicating that a significant portion of users encounter technical issues with some regularity. This suggests a need for system enhancements and potentially stronger technical support to reduce the frequency of such issues.

Improving the reliability of the platform and addressing the most common technical problems could improve user satisfaction and encourage broader adoption of Salesforce within the organization.

The purpose of seventh question is to evaluate the suitability and effectiveness of the training programs provided to Salesforce users at JCDecaux. Effective training is critical for ensuring that they can efficiently use new systems and tools and is a key factor in the successful adoption of the system. By assessing user perceptions of the training's capability, the company can identify areas where further training or support may be needed to increase system usability and productivity.

The replies indicate a varied perception of the training's adequacy. The results show a mean score of 3.62, with 66% of users rating the training as 4 or 5, indicating that most users feel the training is generally sufficient for their needs. This positive feedback indicates that the training program is, overall, effective in training users to navigate Salesforce.

However, the remaining ones rated the training below 4, which implies that there may be room for more comprehensive training, especially on advanced features or troubleshooting.

Increasing these programs could lead to better system usage and higher productivity, as the users will be more comfortable and proficient with the system. This, in turn, can improve overall satisfaction with the CRM system and support the organization's broader goals of improving customer relationship management and operational efficiency.

The purpose of the eighth question is to evaluate the overall satisfaction of users with Salesforce as a CRM platform and their willingness to recommend it to others. This question serves as a proxy for user satisfaction and perceived value, which are critical indicators of the success of the implementation. A higher willingness to recommend could suggest a positive user experience and confidence in the platform's capabilities.

The answers indicate a range of opinions on recommending Salesforce. It shows a mean score of 3.31, with 41% of users rating their willingness to recommend as 4 or 5. This indicates that while a considerable portion of users are satisfied with Salesforce, a significant number remain neutral or hesitant to recommend it.

This neutral stance may imply areas where Salesforce could be enhanced to better meet user expectations. By focusing on continuous improvements based on user feedback, JCDecaux could increase user satisfaction and potentially boost the likelihood of positive recommendations, which would contribute to wider CRM adoption within the organization.

Question number 9 aims to assess the impact of Salesforce on inter-departmental interaction. Effective communication is critical for the continuous execution of business processes and collaborative efforts. Understanding how well it allows this communication, helps determine its effectiveness as a complete CRM tool that not only manages customer relations but also improves internal workflows and collaboration.

The answers provide a varied perspective on Salesforce's ability to facilitate team communication. With a mean score of 3.00 and 38% of respondents rating this aspect as 4 or 5, the data indicates that while some users find the platform beneficial for communication, a significant portion may not fully utilize or understand these features.

This feedback indicates an opportunity to improve Salesforce's communication tools or provide additional training focused on enhancing inter-departmental collaboration. By making these adjustments, JCDecaux could ensure that the program not only supports customer relationship management but also fosters improved collaboration across teams.

As previously said, the survey also had an open-answer question: “What improvements would you suggest for Salesforce based on your experience?”. The purpose of this question is to understand the specific suggestions and feedback provided by the users. This analysis employs thematic analysis, a method for identifying, analysing, and reporting patterns within qualitative data.

The first identified pattern was “Usability and User Interface” used as Theme 1 and some users have emphasized the need for a more agile and user-friendly interface “The product should be more agile and capable, making it easier to use.” (U1) and “A simpler interface.” (U2).

For Theme 2, was detected the next pattern “Automation and Efficiency” There were requests for more integration with other tools and more automated processes. Users suggested automation like “I would suggest that it be more automated, recognising calls, for example, sending proposals to selected contacts would skip a step of sending an email and the proposal...” (U12) and more efficiency as recommended by U14 “Create budgets more quickly and intuitively.”.

Theme 3 “System Integration and Connectivity” is next, and some users noted the lack of complete and accessible information within Salesforce, which affects their ability to work efficiently as mentioned by U18 “Integration with other tools.”.

“Reporting and Data Management” and “Adaptation to Specific Needs” were also defined as Theme 4 and 5 respectively, but with lesser mentions by the users. The remaining feedback were inserted on the “Miscellaneous Feedback”, because of their irrelevance to the outcome.

Below, on table 5, are the answers provided by the survey repliers for this open-ended question:

Theme 1 - Usability and User interface	
U1	The product should be more agile and capable, making it easier to use.
U2	A simpler interface.
U3	Less mandatory information, for example, the start date of campaigns.
U4	Continuous training.
U5	The lack of information in Salesforce makes the work difficult. In the case of JCDecaux, where a client has multiple services, the information is not filled in.

U6	More client information and their history should appear when I have a task associated with them, without the need to open the file and leave the current page.
U7	Better define the KPIs to be extracted and focus usability in that direction.
U8	Have a more user-friendly interface.
U9	Not being able to create duplicates.
U10	For my work area, it doesn't make any sense. This is not a call centre.
Theme 2 - Automation and Efficiency	
U11	The creation of proposals using the JCD template via Salesforce so that we can remotely send and respond to client requests more efficiently.
U12	I would suggest that it be more automated, recognising calls, for example, sending proposals to selected contacts would skip a step of sending an email and the proposal would always remain in the system.
U13	Improve the fields for creating standard proposals for Airport Media.
U14	Create budgets more quickly and intuitively.
U15	Facilitate the opening of brands associated with various entities. For example, **** in the islands still belongs to *****, but in PT Continental, it does not. The same happens with the ***** brand associated with various entities.
U16	New developments and automatisms.
U17	Optimization of reports & automation in the creation of joint proposals.
Theme 3 - System Integration and Connectivity	
U18	Integration with other tools.
U19	The countries in Portuguese-speaking regions.
U20	For example, allow the same contact (person) to be associated with different contracts (which is currently not allowed).
U21	Broaden to other areas.
Theme 4 - Reporting and Data Management	
U22	Greater extraction (e.g., via dashboards) of benefits and projective interpretations.
U23	The necessary developments, verified after use, should be quicker.
Theme 5 - Adaptation to Specific Needs	
U24	A greater alignment with the competencies of each department.

U25	Adapt to the needs of the commercial area.
Miscellaneous Feedback	
U26	At this stage, my level of experience with the platform is not compatible with this question.
U27	Nothing to point out. I believe Salesforce has good products, offers different training possibilities, and regularly shares success cases, making it a reference in the market.
U28/U29	N.A.

Table 5 - User feedback regarding Salesforce usability and functional needs categorized by themes

The answers to the open-ended question, revealed several insights. First, feedback indicated that a significant number of users find Salesforce complicated to navigate. Simplifying the user interface could significantly enhance user satisfaction and efficiency. Was also expressed a strong need for better integration with other tools and more automated workflows, which would save time and streamline operations across departments. The lack of complete information within the CRM is another barrier to efficient work, suggesting that ensuring all necessary data is synchronized and easily accessible can improve productivity.

Training and support were identified as crucial areas for improvement. Regular training sessions and a robust support system can help users stay up to date with the platform’s capabilities and address any issues promptly. Lastly, customization is key to meeting the diverse needs of different departments. Enhancing the platform’s adaptability can ensure it meets specific workflow requirements, leading to better user adoption and satisfaction. The thematic analysis of the open-ended responses reveals critical areas for improvement in the Salesforce CRM implementation. Concentrating on these themes can significantly enhance user satisfaction, streamline operations, and improve overall productivity. Specifically, simplifying the user interface, improving integration and automation, ensuring comprehensive information availability, providing ongoing training and support, and enhancing customization options are essential steps.

The insights from the 10th question, provide a better understanding of user needs and preferences, guiding future improvements in the Salesforce CRM implementation. In the following sections, we will explore the data that came from the first months of usage.

17.1 System Usage Analysis

This section dives into the quantitative data analysis derived from Salesforce's CRM system usage at JCDecaux Portugal. It focuses on understanding the adoption patterns and usage behaviours of the CRM system by examining the number of accounts, opportunities, tasks, and activities logged into Salesforce. The data, collected over several months, provides insights into the system's utilization and effectiveness. This not only reflects user engagement but also helps identify areas for improvement to enhance the overall CRM implementation.

The analysis of accounts added to Salesforce is an important component in understanding the CRM system's adoption. This data provides insights into how effectively the system has been integrated into daily operations, reflecting the company's ability to manage and expand its customer base. Analysing this metric helps in identifying trends, growth patterns, and potential areas for improvement in the CRM implementation process.

The chart in table 6, indicates a significant initial upload of accounts in April 2023, which serves as a baseline for the data. This large influx represents the migration of existing customer information into Salesforce, a critical step in ensuring continuity and comprehensive data management from the outset.

Following the initial upload, there is a visible stabilization in the number of accounts added each month. This trend demonstrates the ongoing adoption and consistent use of Salesforce by the company's teams.

The steady increase in accounts added to Salesforce highlights the system's effective adoption across different departments. The consistent growth signifies that the teams are increasingly relying on Salesforce for customer data management, which is a positive indicator of user engagement and system integration.

The ability to continuously add new accounts reflects the system's robustness and the staff's growing proficiency with the CRM platform. This efficiency in data management supports better customer relationship management and enhances the overall operational workflow.

Date	Number of Records
April 2023	1
May 2023	2090
June 2023	162
July 2023	160
August 2023	117
September 2023	99
October 2023	171
November 2023	147
December 2023	95
January 2024	115
February 2024	103
March 2024	28
Total	3288

Table 6 - How many Accounts are Being Added to CRM chart

The analysis of the accounts added to Salesforce demonstrates a successful initial implementation and growing user engagement with the system. The next section will focus on analysing opportunities added to Salesforce, providing further insights into how the CRM system supports the sales process and overall business strategy at JCDecaux Portugal. This comprehensive analysis will help in understanding the CRM system's impact on business development and customer acquisition strategies.

The chart in table 7 bellow, illustrates the number of opportunities logged into Salesforce from June 2023 to March 2024. This period covers the initial implementation and subsequent usage phases. It shows a significant increase in the number of opportunities added over time, indicating growing engagement with the Salesforce CRM platform.

- *Initial Period (June - August 2023):* During the early months, there was a gradual increase in the number of opportunities added. This slow start is typical for new system implementations, as users begin to familiarize themselves with the platform and its functionalities.
- *Steady Growth (September - December 2023):* From September 2023 onwards, there was a noticeable uptick in the number of opportunities logged. This period corresponds with increased user training and system optimization efforts. The highest peak occurred in October 2023, reflecting a successful drive-in user engagement and data input activities.

- Sustained High Usage (January - March 2024): The months of January and February 2024 maintained high levels of activity, indicating consistent usage and integration of Salesforce into daily operations. March 2024 shows a slight dip, which might suggest seasonal variations or a temporary reduction in data entry activities.

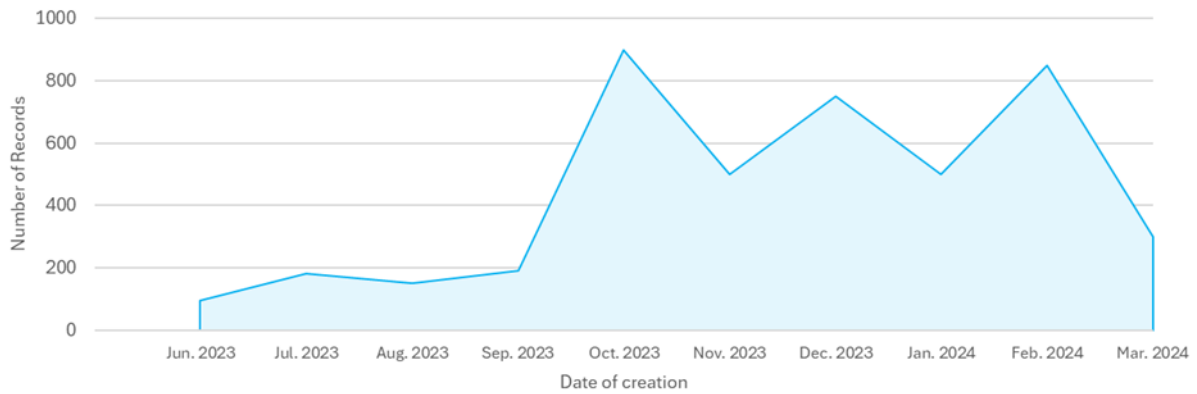


Table 7 - How many Opportunities are being added to CRM chart

The overall increasing trend in the number of opportunities added means successful user adoption of the Salesforce platform. The peaks in October 2023 and sustained high levels in early 2024 highlight effective onboarding and ongoing usage by the team. The growth and high activity levels suggest that the training programs and support mechanisms put in place were effective in helping users become proficient with the system. The data indicates that Salesforce has been well-integrated into the daily operations of the company. The high number of opportunities logged reflects the system's role in managing and tracking sales processes efficiently. To maintain and further enhance user engagement, continuous training, periodic reviews, and updates to the system based on user feedback will be crucial. Ensuring that the platform evolves with the users' needs will help sustain high levels of activity and leverage the full potential of Salesforce.

Looking into the analysis of tasks and activities added to Salesforce is essential in understanding the operational engagement with the CRM system. This analysis highlights user interactions and the system's role in managing day-to-day business operations. By tracking the number of tasks and activities, we can gauge the effectiveness and adoption rate of Salesforce within the organization.

The chart below in table 8, shows the distribution of tasks and activities added to Salesforce over a 10-month period from June 2023 to March 2024.

Throughout the analysis period, December 2023 stands out significantly, accounting for nearly half of the total tasks and activities recorded. This period indicates a high-intensity phase where Salesforce was heavily relied upon for managing a surge in operational activities. Following this peak, there is a sustained level of engagement from January to March 2024, demonstrating consistent usage of the CRM system. The remaining months show a gradual build-up in usage, with notable increases in October and November 2023.

Date	Number of Records
June 2023	196
July 2023	274
August 2023	217
September 2023	295
October 2023	487
November 2023	469
December 2023	2893
January 2024	615
February 2024	547
March 2024	193
Total	6186

Table 8 - How many tasks are being added to CRM chart

The observed trends, reveal several insights into the adoption and usage of Salesforce within the organization. The significant peak in December 2023 highlights a period of intense activity, likely associated with major business campaigns or operational drives. This peak emphasizes the importance of having robust CRM support and resources available during such high-demand periods.

The increasing usage from January to May 2024 indicates that Salesforce has become well-integrated into the daily operations of the organization. This consistent use, underscores the effectiveness of the initial training and support provided, ensuring they are well-equipped to handle their tasks using the CRM system.

Furthermore, the gradual increase in the earlier months points to a successful ramp-up phase, where users progressively adopted the new system. This phase involved overcoming initial resistance and acclimating to new workflows and processes facilitated by Salesforce.

Understanding these patterns is crucial for future resource planning and management. Ensuring adequate support and system capacity during peak periods can help maintain

operational efficiency and user satisfaction. Additionally, ongoing training and support initiatives can address any dips in engagement, ensuring continuous improvement and adaptation of the CRM system to meet the evolving needs of the organization.

The analysis of tasks and activities logged into Salesforce demonstrates the system's critical role in managing business operations, particularly during high-intensity periods. This analysis sets the stage of user feedback and the overall impact of the CRM implementation on business processes.

17.2 Qualitative Feedback and Challenges

This section resumes the feedback from various progress review documents and training sessions as showed in appendices 1 and 2, highlighting the common challenges faced by JCDecaux Portugal during the transition to Salesforce. By categorizing and analysing this feedback, we can identify recurring themes and address key issues to enhance the overall effectiveness of the CRM system.

The feedback from progress review meetings and training sessions clarified the diverse experiences of users across different departments in early development. The qualitative data was collected through group meetings and feedback forms, and several recurring themes emerged:

1. *User Resistance and Adoption:* Resistance to change was a challenge. Some users were comfortable to the old system and found it challenging to adapt to Salesforce's new interface and functionalities. Despite training sessions, some expressed discomfort with the new system, citing a steep learning curve and difficulties in navigating Salesforce.
2. *Integration Problems:* Integrating Salesforce with existing tools and processes posed several challenges. It was highlighted issues with synchronization between Salesforce and other software used within the company. These integration problems often led to duplication of efforts and inefficiencies in workflow management.
3. *Training and Support:* Although training sessions were conducted, users felt that ongoing support was necessary to fully leverage Salesforce's capabilities. Feedback indicated a need for more in-depth training sessions and continuous support to address specific user queries and challenges. It also suggested that the training material could be more tailored to their specific roles and tasks.

4. *Customization and Flexibility*: Users expressed a desire for greater customization within the platform, to better align with their specific business processes. They reported that some features were too rigid and did not adequately accommodate their unique needs. The feedback emphasized the importance of flexibility in the system to adapt to varying workflows.

The qualitative feedback highlights critical areas that require attention to optimize Salesforce's implementation. Enhancing user training and support, resolving integration challenges, and increasing customization options are essential for improving user adoption and satisfaction.

17.3 Impact on Organizational Processes

The implementation of Salesforce has had impact on the company's internal processes, leading to improvements in efficiency, data management, and customer interactions.

The adoption of Salesforce has resulted in marked improvements in operational efficiency. The automation of routine tasks such as data entry, follow-up reminders, and report generation has reduced the manual workload for application users. This allows staff to focus more on strategic activities rather than administrative tasks.

One of the key benefits of this process has been the centralization and improved management of data. Previously, JCDecaux's customer data was dispersed across various Excel sheets and systems, leading to inconsistencies and difficulties in accessing up-to-date information. Salesforce has provided a unified platform where all customer data is stored and can be accessed in real-time. This centralization has enhanced data accuracy and integrity, making it easier to generate reliable reports and insights.

Additionally, the integration capabilities with other systems like Informa DB and SAP have ensured data flow across different departments. This integration has eliminated data silos, enabling a holistic view of customer interactions and business operations.

Customer interaction capabilities was also enhanced. With complete customer profiles and interaction histories available, sales and customer service teams can offer more personalized and responsive service. The CRM system's analytics and reporting tools allow for better understanding of customer behaviour and preferences, enabling targeted marketing campaigns and proactive customer service.

The advanced analytics and reporting capabilities have empowered the company management with actionable insights. Decision-makers can now leverage real-time data to make informed strategic decisions. For example, detailed dashboards and reports on

sales performance, customer engagement, and market trends provide a clear picture of business health and opportunities for growth.

The ability to segment customers based on various criteria and track the performance of different campaigns has enabled more precise and effective marketing strategies. Additionally, the predictive analytics tools in the platform help forecast future sales and customer needs, allowing for better planning and resource allocation.

The implementation has streamlined workflows across various departments at JCDecaux. The CRM system's workflow automation features ensure that processes are consistent and efficient. For instance, automated approval processes, task assignments, and follow-up reminders have reduced bottlenecks and ensured that tasks are completed in a timely manner.

Cross-departmental collaboration has also improved, as all teams have access to the same up-to-date customer data and can coordinate their efforts more effectively. The use of Chatter, Salesforce's collaboration tool, helped better communication and knowledge sharing among departments, further enhancing workflow efficiency.

The implementation of Salesforce at JCDecaux features several key implications for the company's future operations and strategic direction:

1. **Scalability and Flexibility:** Salesforce's scalable architecture ensures that the CRM system can grow with JCDecaux's expanding operations and client base. This scalability will be crucial as the company continues to explore new markets and business opportunities.
2. **Continuous Improvement:** The ongoing collection and analysis of user feedback will allow JCDecaux to continuously improve the CRM system and adapt it to evolving business needs. Regular training and support will be essential to maintain high levels of user adoption and satisfaction.
3. **Data-Driven Culture:** The enhanced data management and analytics capabilities of Salesforce will foster a data-driven culture within JCDecaux. Encouraging employees to leverage data for decision-making will lead to more strategic and effective business practices.
4. **Global Replication:** The insights and best practices gained from the Salesforce implementation in Portugal can serve as a model for other JCDecaux subsidiaries worldwide. By replicating this successful transition, the company can achieve a unified and efficient CRM strategy across its global operations.

17.4 Theoretical Framework Application

In this section, it's analysed the application of the different theoretical frameworks that have been discussed in earlier chapters, specifically focusing on Lewin's Change Management Model, Kotter's 8-Step Change Model, and the Unified Theory of Acceptance and Use of Technology (UTAUT). These frameworks provide insights into understanding and managing the change process during the CRM implementation at JCDecaux Portugal.

Lewin's Change Management Model, consists of three stages: Unfreeze, Change, and Refreeze, has been helpful in guiding the CRM implementation process.

Using the Unfreeze stage, the need for change was recognized in late 2022 when it became evident that the existing CRM system (HubSpot) was not meeting the growing needs of JCDecaux Portugal. Regular group meetings aided by the IT team, played a crucial role in communicating the necessity of transitioning to other CRM. These sessions highlighted the limitations of the current system and the potential benefits of adopting a new one, thereby creating a sense of urgency and preparing the organization for change (Cohen, Manion, & Morrison, 2007).

The transition phase (Change stage) began in December 2022, with the beginning of meetings for the Salesforce implementation. This phase was characterized by significant communication and support, ensuring that main users were not only aware of the changes but also could give their insights to handle them effectively.

By June 2023, the new CRM system was fully implemented. The focus then shifted to stabilizing the change and integrating Salesforce into the daily operations of JCDecaux Portugal (Refreeze stage). Continuous monitoring, feedback mechanisms, and support ensured that the new system was firmly embedded within the organizational processes. This phase also involved the consolidation of gains and making necessary adjustments to ensure the long-term success of the CRM system (Sarmiento et al., 2003).

Kotter's 8-Step Change Model provided a structured approach to managing the CRM transition, emphasizing the importance of leadership and communication throughout the process.

1. Create a Sense of Urgency: The limitations of HubSpot and the advantages of Salesforce were communicated to all stakeholders, creating a sense of urgency for the change.

2. *Build a Guiding Coalition:* A combination of key stakeholders, including senior management and department heads, was formed to champion the change initiative.
3. *Develop a Vision and Strategy:* A clear vision and strategy for the CRM implementation was developed, focusing on improved efficiency, data management, and customer interactions.
4. *Communicate the Vision:* Regular updates and communication through meetings, emails, and training sessions ensured that the vision was effectively communicated to all main users.
5. *Empower Broad-Based Action:* Users were encouraged to provide feedback and suggestions throughout the implementation process, empowering them to take ownership of the change.
6. *Generate Short-Term Wins:* Quick wins, were celebrated to build momentum and demonstrate the benefits of the new system.
7. *Consolidate Gains and Produce More Change:* The implementation team continued to build on the early successes, making necessary adjustments and improvements based on user feedback.
8. *Anchor New Approaches in the Culture:* Efforts were made to integrate Salesforce into the organizational culture, ensuring that the new system became a fundamental part of JCDecaux Portugal's operations (Kotter, 1996).

The Unified Theory of Acceptance and Use of Technology (UTAUT) model, developed by Venkatesh et al. (2003), is a framework designed to understand the factors influencing the acceptance and use of technology within organizations. This model integrates elements from eight previously established models, including the Theory of Reasoned Action (TRA), Technology Acceptance Model (TAM), and Innovation Diffusion Theory (IDT), among others. UTAUT identifies four core constructs that directly impact user intention and behaviour: Performance Expectancy, Effort Expectancy, Social Influence, and Facilitating Conditions. These constructs are moderated by factors such as gender, age, experience, and voluntariness of use. Applying the UTAUT model to the CRM implementation at JCDecaux Portugal provides a better understanding of the factors influencing user adoption of Salesforce.

In this model, Performance expectancy is the degree to which users believe that using the new technology will help them improve their job performance. In the context of researched company, users expected that Salesforce would enhance their productivity by offering superior data management capabilities, streamlined processes, and improved

customer interactions. The survey results indicate that a significant number of users found Salesforce to be a valuable tool for their work. This is consistent with the findings of Venkatesh et al. (2003), who noted that performance expectancy is a critical determinant of user acceptance.

For example, users appreciated features like advanced analytics and automation, which were perceived to reduce manual workload and increase efficiency. The positive response towards performance expectancy suggests that it was recognized the potential benefits of Salesforce in allowing better decision-making and more effective management of customer relationships.

Effort expectancy refers to the perceived ease of use associated with the new technology. This construct is crucial in determining how quickly users can become proficient with the system. The survey responses at JCDecaux Portugal revealed mixed feelings about the ease of navigating Salesforce. While some users found the platform intuitive and user-friendly, others highlighted areas for improvement, particularly in terms of customization and initial setup.

Training sessions and continuous support were essential in addressing these concerns. By simplifying the user interface and providing comprehensive training programs, the organization aimed to lower the perceived effort required to use Salesforce, therefore enhancing overall user satisfaction and adoption rates. The findings align with previous studies indicating that reducing perceived effort can significantly impact technology acceptance (Venkatesh & Davis, 2000).

Social influence is the degree to which users perceive that important others believe they should use the new technology. At JCDecaux Portugal, social influence played a significant role in the adoption of Salesforce. The support and encouragement from peers, supervisors, and key stakeholders were key in fostering a positive attitude towards the new CRM system.

Regular training sessions, involvement of department heads in the implementation process, and consistent communication about the benefits of Salesforce contributed to a supportive environment. This aligns with Venkatesh et al. (2003), who emphasized that social influence can strongly impact user intention, particularly in the early stages of technology adoption. The positive social influence within the organization helped mitigate resistance and promote a culture of collaboration and acceptance.

Facilitating conditions refer to the degree to which users believe that an organizational and technical infrastructure exists to support the use of the new technology. At JCDecaux

Portugal, the availability of technical support, resources, and ongoing assistance played a crucial role in facilitating the use of Salesforce. The feedback indicated that while the support was generally adequate, there were areas for improvement, particularly in accessibility and responsiveness of the support services.

Ensuring ease of conditions involved not only providing technical support but also integrating Salesforce seamlessly with existing systems and workflows. By addressing integration challenges and ensuring that the necessary resources were available, the organization aimed to create an environment that wanted to lead to a successful technology adoption. This is consistent with the findings of Venkatesh et al. (2003), who highlighted the importance of facilitating conditions in determining user behaviour and technology acceptance.

By applying the UTAUT model, this dissertation was able to identify and address key factors influencing the acceptance and use of Salesforce. This comprehensive understanding facilitated a more effective implementation process, ensuring that the new CRM system was well-received and integrated seamlessly into the organization's operations. The insights gained from this application can inform future technology adoption initiatives, pointing out the importance of a structured approach to managing change and promoting user acceptance.

Several challenges were encountered in the data collection and analysis phases of the study, impacting the scope and depth of the findings.

About data accessibility, public share of certain data was restricted due to confidentiality and organizational policies. This limitation affected the ability to justify and provide quantitative data on CRM usage metrics and user interactions within the system. While aggregate data were available, detailed individual-level data could not be used, limiting the analysis.

Taking into consideration the survey response rates, while efforts were made to encourage participation, the response rate was lower than expected. This could be attributed to survey fatigue or a lack of engagement among some employees. The lower response rate may impact the representativeness of the survey findings and the ability to generalize them.

Regarding the group meetings dynamics, it can influence the data collected. Dominant participants may steer the discussion, dominating quieter members and potentially leading to an incomplete or biased understanding of the issues discussed. Efforts were

made to facilitate balanced participation, but some dynamics may still have affected the outcomes.

The technical limitations of the CRM system itself posed challenges in data collection. Issues such as system downtime or data inconsistencies affected the reliability of CRM-generated reports used in the analysis. These technical issues highlight the complexities involved in implementing and integrating a new system within a large organization.

18. Summary of Key Findings and Implications

In this dissertation, it was examined the CRM implementation journey of JCDecaux Portugal, focusing on the transition to Salesforce. This study aimed to provide actionable insights for JCDecaux's global operations and to serve as a reference for other multinational corporations embarking on similar transitions.

Our research methodology was based in the principles of action research, which involved a cyclical process of planning, acting, observing, and reflecting. This approach allowed an engagement closer to the practical aspects of the CRM implementation, ensuring that the study remained relevant.

The literature review set the basis for the study, by exploring key concepts of CRM systems, and the theoretical frameworks of Lewin's Change Management Model, Kotter's 8-Step Change Model, and the UTAUT framework. These models provided a solid ground through which we could analyse the process and its impact on organizational change.

The study revealed the following findings:

Technical and Human Challenges
The transition to Salesforce involved overcoming substantial technical challenges, including data migration and system integration. Additionally, managing the human aspect of change, such as user resistance and the need for comprehensive training, was critical (Kotter, 1996; Lewin, 1947).
Survey Insights
The survey results, guided by the SUS methodology, provided valuable insights into user satisfaction and areas needing improvement. Most users found Salesforce easy to navigate and useful for their work, though some expressed the need for better integration and more comprehensive training.
System Usage Patterns
Quantitative data analysis showed increasing adoption and usage of Salesforce across the organization. The number of accounts, opportunities, tasks, and activities logged into the system demonstrated a positive trend, indicating successful integration into daily operations.
Qualitative Feedback and Challenges

Regular progress review meetings and training sessions highlighted recurring themes such as data migration issues, user resistance, and integration problems. Addressing these challenges required continuous engagement and adaptive strategies.
Impact on Organizational Processes
The CRM implementation significantly improved internal processes, enhancing efficiency, data management, and customer interactions. Salesforce facilitated better decision-making and streamlined workflows, contributing to the overall effectiveness of the organization.

Table 9 - Key Findings in this research

The findings from this research have the following practical implications for JCDecaux Portugal, as shown in table 10.

Continuous Improvement
The action research approach underscores the importance of continuous improvement. Regular feedback loops and iterative adjustments were crucial for addressing challenges and enhancing the CRM system's effectiveness.
Training and Support
Ongoing training and support are essential for sustaining high levels of user adoption and satisfaction. Tailoring training programs to address specific user needs and challenges can further improve user engagement and proficiency.
Strategic Alignment
Aligning the CRM implementation with strategic business goals is vital. Ensuring that the CRM system supports the organization's broader objectives can enhance its impact and value.

Table 10 - Implications for JCDecaux Portugal

19. Theoretical Contributions

This study makes contributions to the academic discourse on CRM implementations, particularly through the application and integration of established change management models and the practical insights gained from the implementation process.

The use of Lewin's Change Management Model, Kotter's 8-Step Change Model, and the UTAUT framework provided a comprehensive understanding of the change process

within JCDecaux Portugal (Lewin, 1947; Kotter, 1996; Venkatesh et al., 2003). Lewin's model, helped in identifying the phases of CRM adoption and the necessary steps to facilitate smooth transitions. Kotter's 8-Step Change Model offered a structured approach to leading the change, emphasizing the importance of creating a sense of urgency, building a guiding coalition, and anchoring new approaches in the organizational culture. The UTAUT framework was crucial in understanding user acceptance and the factors influencing the adoption of the CRM system. These models helped in identifying critical success factors and barriers, providing a structured framework for analysing the implementation process.

This dissertation provides practical insights into the technical and human challenges associated with CRM implementations. It highlights the critical role of user training and support in overcoming resistance and ensuring successful adoption. The findings emphasize the importance of attending technical challenges such as data migration and system integration early in the implementation process to avoid disruptions and ensure smooth operation (Cohen et al., 2007; Davison et al., 2004).

It also demonstrates how CRM systems can transform organizational processes by improving data management, enhancing customer interactions, and providing better decision-making. These improvements can lead to increased efficiency and effectiveness in achieving business goals. The integration of theoretical frameworks with practical implementation insights provides a holistic view of CRM adoption, bridging the gap between theory and practice (Reinartz et al., 2004; Payne & Frow, 2005).

Through these theoretical and practical contributions, the study not only enhances the understanding of CRM implementations but also provides actionable recommendations that can guide future research and practice in the field of customer relationship management.

20. Recommendations

Based on the findings, this study can provide some recommendations for JCDecaux Portugal and other organizations undertaking similar CRM implementations, as shown in table 11:

Foster a Culture of Continuous Improvement
Encourage regular feedback and iterative adjustments to address emerging challenges and improve system performance.
Enhance Training Programs
Develop tailored training programs that address specific user needs and provide ongoing support to ensure high levels of user adoption and satisfaction.
Leverage Theoretical Frameworks
Apply change management models to guide the implementation process, ensuring a structured and effective approach to managing organizational change.

Table 11 - Recommendations for JCDecaux Portugal

21.Future Research Directions

This study opens several dimensions for future research, offering a foundation upon which further academic inquiry and practical exploration can be built and made.

- **Long-term Impact of CRM Systems**

Future research could plunge into the long-term effects of CRM implementations on organizational performance and customer relationships. While this study provides insights into the initial and intermediate outcomes of CRM adoption, understanding its sustained impact over several years would be invaluable. This includes examining how it influences customer loyalty, retention rates, and overall customer satisfaction in the long run. Additionally, long-term studies could investigate how CRM systems contribute to the continuous improvement of business processes and strategic decision-making within organizations. By tracking performance metrics over an extended period, researchers can better understand the enduring benefits and potential drawbacks of CRM systems.

- **Comparative Studies**

Conducting comparative studies across different industries or geographical locations can help identify best practices and common challenges in CRM implementations. Different sectors, such as retail, healthcare, finance, and advertising, might experience unique obstacles and advantages when adopting CRM systems. Similarly, the cultural and economic contexts of various regions can significantly influence the success of it. Comparative research can shed light on how industry-specific needs and regional

characteristics impact its adoption and utilization. Such studies can provide a broader understanding of the factors that contribute to successful CRM implementations, offering valuable insights for businesses operating in different environments.

- **Advanced Analytics**

Exploring the role of advanced analytics and artificial intelligence (AI) in enhancing CRM functionalities and driving business insights is another area for future research. Advanced analytics, including predictive modelling and machine learning, can help organizations better understand customer behaviour, forecast trends, and make data-driven decisions. AI-powered CRM systems can automate routine tasks, personalize customer interactions, and improve the efficiency of sales and marketing efforts. Research in this area could focus on developing new analytical models and algorithms tailored to specific business needs. Additionally, investigating the ethical implications and data privacy concerns associated with the use of advanced analytics and AI in these systems would be essential to ensure responsible and effective deployment.

22. Concluding Insights and Answer to the Research Question

This study set out to answer the research question: "What strategies is JCDecaux Portugal using to handle the technical and human challenges of moving to a CRM system, and how can these strategies help other countries in the company do the same?".

The findings reveal that JCDecaux Portugal employed a comprehensive approach to address the multifaceted challenges associated with CRM implementation. The technical strategies included data migration and integration plans, extensive customization of Salesforce to align with business processes, and the use of solutions to ensure seamless system interoperability. These measures were critical in overcoming the technical obstacles and ensuring the system's functionality and reliability.

On the human side, the company prioritized user training and support through programs designed to provide a smooth transition. This effectively managed resistance to change, engaging users throughout the process and fostering a supportive environment. Continuous improvement mechanisms were established to maintain system relevance and efficiency, reflecting a commitment to long-term success.

These strategies provide a blueprint for other JCDecaux branches globally, indicating the importance of a phased and inclusive approach to CRM implementation. By focusing on

both technical excellence and user adoption, JCDecaux Portugal has set a standard that can be adapted to different regional contexts within the multinational corporation.

In summary, the key to successful CRM implementation lies in a balanced approach that addresses both the technical complexities and the human elements of change. The experiences and insights gained from this case study, offer valuable lessons for similar initiatives across the group and other multinational companies, contributing to the broader understanding of effective CRM adoption in complex organizational settings.

REFERENCES

- Agnihotri, R., Dingus, R., Hu, M. Y., & Krush, M. T. (2016). Social media: Influencing customer satisfaction in B2B sales. *Industrial Marketing Management*, 53, 172-180. <https://doi.org/10.1016/j.indmarman.2015.09.003>
- Ajzen, I. (1991). The theory of planned behavior. *Organizational Behavior and Human Decision Processes*, 50(2), 179-211. [https://doi.org/10.1016/0749-5978\(91\)90020-T](https://doi.org/10.1016/0749-5978(91)90020-T)
- Avison, D., Baskerville, R., & Myers, M. (1999). Controlling action research projects. *Information Technology & People*, 14(1), 28-45. <https://doi.org/10.1108/09593840110384762>
- Bala, H., & Venkatesh, V. (2007). Assimilation of Interorganizational Business Process Standards. *Information Systems Research*, 18(3), 340-362. <https://doi.org/10.1287/isre.1070.0134>
- Bandura, A. (1986). *Social Foundations of Thought and Action: A Social Cognitive Theory*. Prentice-Hall.
- Bartlett, C. A., & Beamish, P. W. (2018). *Transnational Management: Text, Cases & Readings in Cross-Border Management*. Cambridge University Press.
- Boone, H. N., & Boone, D. A. (2012). Analyzing Likert data. *Journal of Extension*, 50(2), 1-5.
- Braun, V., & Clarke, V. (2006). Using thematic analysis in psychology. *Qualitative Research in Psychology*, 3(2), 77-101. <https://doi.org/10.1191/1478088706qp063oa>
- Brooke, J. (1996). SUS: A quick and dirty usability scale. In P. W. Jordan, B. Thomas, I. L. McClelland, & B. Weerdmeester (Eds.), *Usability Evaluation in Industry* (pp. 189-194). London: Taylor & Francis.
- Brooke, J. (2013). SUS: A retrospective. *Journal of Usability Studies*, 8(2), 29-40.
- Buttle, F., & Maklan, S. (2015). *Customer Relationship Management: Concepts and Technologies*. Routledge.
- Cohen, L., Manion, L., & Morrison, K. (2007). *Research Methods in Education* (6th ed.). Routledge.
- Creswell, J. W., & Poth, C. N. (2018). *Qualitative Inquiry and Research Design: Choosing Among Five Approaches* (4th ed.). SAGE Publications.
- Dakouan, C., Benabdelouahed, R., & Anabir, H. (2019). Inbound Marketing vs. Outbound Marketing: Independent or Complementary Strategies. *Expert Journal of Marketing*, 7(1). <https://marketing.expertjournals.com/23446773-701/>

- Davis, F. D. (1989). Perceived usefulness, perceived ease of use, and user acceptance of information technology. *MIS Quarterly*, 13(3), 319-340.
<https://doi.org/10.2307/249008>
- Davis, F. D., Bagozzi, R. P., & Warshaw, P. R. (1992). Extrinsic and intrinsic motivation to use computers in the workplace. *Journal of Applied Social Psychology*, 22(14), 1111-1132.
<https://doi.org/10.1111/j.15591816.1992.tb00945.x>
- Donthu, N., Cherian, J., & Bhargava, M. (2013). Factors influencing recall of outdoor advertising. *Journal of Advertising Research*, 33(3), 64-72.
- Field, A. (2013). *Discovering Statistics Using IBM SPSS Statistics (4th ed.)*. SAGE Publications.
- Fishbein, M., & Ajzen, I. (1975). *Belief, Attitude, Intention, and Behavior: An Introduction to Theory and Research*. Addison-Wesley.
- Ghemawat, P. (2001). Distance still matters: The hard reality of global expansion. *Harvard Business Review*, 79(8), 137-147.
- Hallikainen, H., Laukkanen, T., & Huhtala, M. (2019). How a company's commitment to change predicts the successful implementation of a CRM system. *Journal of Change Management*, 19(2), 113-130.
- Halligan, B., & Shah, D. (2009). *Inbound Marketing: Get Found Using Google, Social Media, and Blogs*. John Wiley & Sons.
- Halligan, B., & Shah, D. (2014). *Inbound Marketing, Revised and Updated: Attract, Engage, and Delight Customers Online*. John Wiley & Sons.
- Hill, C. W. L. (2014). *International Business: Competing in the Global Marketplace*. McGraw-Hill Education.
- Hofstede, G. (2001). *Culture's Consequences: Comparing Values, Behaviors, Institutions, and Organizations Across Nations*. SAGE Publications.
- Hwang, J., & McMillan, S. J. (2002). The role of interactivity and involvement in attitude toward the website. *International Journal of Advertising*, 21(3), 55-78.
- Itani, O. S., Agnihotri, R., & Dingus, R. (2017). Social media use in B2B sales and its impact on competitive intelligence collection and adaptive selling: Examining the role of learning orientation as an enabler. *Industrial Marketing Management*, 66, 64-79. <https://doi.org/10.1016/j.indmarman.2017.07.010>
- JCDecaux. (2024). Corporate Information. Retrieved from <https://www.jcdecaux.com/>
- Järvinen, J., & Taiminen, H. (2016). Harnessing marketing automation for B2B content marketing. *Industrial Marketing Management*, 54, 164-175.
<https://doi.org/10.1016/j.indmarman.2015.07.002>

- Javalgi, R. G., Hall, K. D., & Cavusgil, S. T. (2014). Corporate entrepreneurship, customer-oriented selling, absorptive capacity, and international sales performance in the international B2B setting: Conceptual framework and research propositions. *International Business Review*, 23(6), 1193-1202.
- Jayachandran, S., Sharma, S., Kaufman, P., & Raman, P. (2005). The role of relational information processes and technology use in customer relationship management. *Journal of Marketing*, 69(4), 177-192.
<https://doi.org/10.1509/jmkg.2005.69.4.177>
- King, S. F., & Burgess, T. F. (2008). Understanding success and failure in customer relationship management. *Industrial Marketing Management*, 37(4), 421-431.
- Kotter, J. P. (1996). *Leading Change*. Boston, MA: Harvard Business School Press.
- Krogue, K., & Townsend, K. (2013). *Inside Sales Virtual Summit*. Insidesales.com.
- Kumar, V., & Reinartz, W. (2016). *Customer relationship management: Concept, strategy, and tools* (3rd ed.). Springer Texts in Business and Economics.
- Lewin, K. (1947). Frontiers in group dynamics: Concept, method and reality in social science; social equilibria and social change. *Human Relations*, 1(1), 5-41.
- Liberati, A., Altman, D. G., Tetzlaff, J., Mulrow, C., Gøtzsche, P. C., Ioannidis, J. P., ... & Moher, D. (2009). The PRISMA statement for reporting systematic reviews and meta-analyses of studies that evaluate health care interventions: explanation and elaboration. *PLoS Med*, 6(7), e1000100.
<https://doi.org/10.1371/journal.pmed.1000100>
- Likert, R. (1932). A technique for the measurement of attitudes. *Archives of Psychology*, 22(140), 1-55.
- Malthouse, E. C., Haenlein, M., Skiera, B., Wege, E., & Zhang, M. (2013). Managing customer relationships in the social media era: Introducing the social CRM house. *Journal of Interactive Marketing*, 27(4), 270-280.
<https://doi.org/10.1016/j.intmar.2013.09.008>
- Maxwell, J. A. (2013). *Qualitative Research Design: An Interactive Approach* (3rd ed.). SAGE Publications.
- Moher, D., Liberati, A., Tetzlaff, J., Altman, D. G., & The PRISMA Group. (2009). Preferred reporting items for systematic reviews and meta-analyses: The PRISMA statement. *PLoS Med*, 6(7), e1000097.
<https://doi.org/10.1371/journal.pmed.1000097>
- Morgan, R. M., & Inks, L. W. (2001). Personal selling and sales management: A relationship marketing perspective. *Journal of Personal Selling & Sales Management*, 21(3), 231-241

Nahar, S., & Dhaka, P. (2014). A Review: Benefits and Critical Factors of Customer Relationship Management. *Global Journal of Computer Science and Technology*. <https://www.semanticscholar.org/paper/A-Review-%3A-Benefits-and-Critical-Factors-of-Nahar-Dhaka/c4e0f13e63eada85e0c825385649531df8e5f290>

Page MJ, et al. *BMJ* 2021;372:n71. doi: 10.1136/bmj.n71

Parvatiyar, A., & Sheth, J. N. (2001). Customer relationship management: Emerging practice, process, and discipline. *Journal of Economic and Social Research*, 3(2), 1-34.

Payne, A., & Frow, P. (2005). A strategic framework for customer relationship management. *Journal of Marketing*, 69(4), 167-176. <https://doi.org/10.1509/jmkg.2005.69.4.167>

Rapp, A., Trainor, K. J., & Agnihotri, R. (2010). Performance implications of customer-linking capabilities: Examining the complementary role of customer orientation and CRM technology. *Journal of Business Research*, 63(11), 1229-1236. <https://doi.org/10.1016/j.jbusres.2009.11.002>

Reinartz, W., Krafft, M., & Hoyer, W. D. (2004). The customer relationship management process: Its measurement and impact on performance. *Journal of Marketing Research*, 41(3), 293-305. <https://doi.org/10.1509/jmkr.41.3.293.35991>

Rodriguez, M., Peterson, R. M., & Ajjan, H. (2015). CRM/social media technology: Impact on customer orientation process and organizational sales performance. *Journal of Marketing Development and Competitiveness*, 9(1), 1-11.

Rogers, E. M. (2003). *Diffusion of Innovations* (5th ed.). Free Press.

Sarmiento, A., Batista, J., Cardoso, L., Lousa, M., Babo, R., & Rebelo, T. (2003). The use of action research in the improvement of communication in a community of practice. In *Knowledge Management* (pp. 274-290). IGI Global. <https://doi.org/10.4018/978-1-93177-751-3.ch020>

Sarkar Sengupta, A., Shah, J., & Sharma, S. (2015). Measuring CRM effectiveness in India: A meta-analysis. *International Journal of Market Research*, 57(5), 665-690. <https://doi.org/10.2501/IJMR-2015-070>

Shenton, A. K. (2004). Strategies for ensuring trustworthiness in qualitative research projects. *Education for Information*, 22(2), 63-75. <https://doi.org/10.3233/EFI-2004-22201>

Singh, J., & Singh, H. (2020). Smart CRM: A review of AI integration in customer relationship management. *Economics, Management, and Financial Markets*, 15(1), 57-64.

Strauss, A., & Corbin, J. (1990). *Basics of Qualitative Research: Grounded Theory Procedures and Techniques*. SAGE Publications.

- Taylor, S., & Todd, P. A. (1995). Assessing IT usage: The role of prior experience. *MIS Quarterly*, 19(4), 561-570. <https://doi.org/10.2307/249633>
- Teece, D. J. (2007). Explicating dynamic capabilities: The nature and microfoundations of (sustainable) enterprise performance. *Strategic Management Journal*, 28(13), 1319-1350. <https://doi.org/10.1002/smj.640>
- Thompson, R. L., Higgins, C. A., & Howell, J. M. (1991). Personal computing: Toward a conceptual model of utilization. *MIS Quarterly*, 15(1), 125-143. <https://doi.org/10.2307/249443>
- Trainor, K. J., Andzulis, J. M., Rapp, A., & Agnihotri, R. (2014). Social media technology usage and customer relationship performance: A capabilities-based examination of social CRM. *Journal of Business Research*, 67(6), 1201-1208. <https://doi.org/10.1016/j.jbusres.2013.05.002>
- Vashisht, D., & Kumar, P. (2015). A study on the impact of customer relationship management (CRM) practices on hotel performance using structural equation modeling. *Global Journal of Multidisciplinary Studies*, 4(7), 1-9.
- Venkatesh, V., Morris, M. G., Davis, G. B., & Davis, F. D. (2003). User Acceptance of Information Technology: Toward a Unified View. *MIS Quarterly*, 27(3), 425-478. <https://doi.org/10.2307/30036540>
- Verhoef, P. C., & Donkers, B. (2001). Predicting customer potential value an application in the insurance industry. *Decision Support Systems*, 32(2), 189-199. [https://doi.org/10.1016/S0167-9236\(01\)00110-5](https://doi.org/10.1016/S0167-9236(01)00110-5)
- Verhoef, P. C., Reinartz, W. J., & Krafft, M. (2010). Customer engagement as a new perspective in customer management. *Journal of Service Research*, 13(3), 247-252. <https://doi.org/10.1177/1094670510375461>
- Wilson, R. T., & Till, B. D. (2008). Airport advertising effectiveness: An exploratory field study. *Journal of Advertising*, 37(1), 59-72. <https://doi.org/10.2753/JOA0091-3367370105>
- Yin, R. K. (2017). *Case Study Research and Applications: Design and Methods* (6th ed.). SAGE Publications.
- Wang, C. L., & Ahmed, P. K. (2007). Dynamic capabilities: A review and research agenda. *International Journal of Management Reviews*, 9(1), 31-51. <https://doi.org/10.1111/j.1468-2370.2007.00201.x>

Annex I – Salesforce Usability Questionnaire

CRM Usability Questionnaire

Questions

1. How do you evaluate the ease of navigation in Salesforce?
2. Does Salesforce provide all the necessary information for you to perform your job effectively?
3. Do you consider it easy to customize Salesforce according to your specific needs?
4. Do you feel productive when using Salesforce?
5. Is Salesforce's technical support adequate and easily accessible?
6. Do you frequently encounter technical problems when using Salesforce?
7. Is the training provided by Salesforce sufficient for the efficient use of the system?
8. Would you recommend Salesforce to a new employee in the company?
9. Does Salesforce facilitate collaboration between teams?
10. What improvements would you suggest for Salesforce based on your experience?

Objective of Each Question

1. Focuses on the intuitiveness of the user interface.
2. Evaluates whether the system meets the information needs of users.
3. Measures the flexibility and adaptability of the system.
4. Assesses the perception of productivity.
5. Determines the system's effectiveness.
6. Measures the reliability and stability of the system.
7. Evaluates the training provided.
8. Measures the level of satisfaction.
9. Explores whether the system helps improve internal collaboration.
10. Solicits direct feedback to identify specific areas for improvement.

Appendix I – Progress Review Marketing (JCDecaux, 2023)

Progress Review [Marketing] – 02/02/2023

Participants

-
-
-
-
-
-

Resume

In the Marketing meeting today, we came to the conclusion that the Marketing requirements for Events and Newsletters that were planned for Phase 2 (TBD) of the CRM project and was expected to replace the existing Marketing platform Hubspot, are not covered by the current contracted Salesforce licensing and require the module for B2B Marketing Automation (Pardot).

Since the Inbound Leads are a cross Marketing / Sales Inbound process we will cover this in a new meeting with both teams next week.

Issues

Issue	Issue description	Status	Issue Type	Department	Date reported
Marketing Scope	Marketing Events and Newsletters were planned for Phase 2 (TBD) of the CRM project and was expected to replace the existing marketing platform Hubspot. Marketing requirements for Events and Newsletters are not covered by the current contracted Salesforce licensing and require the module for B2B Marketing Automation (Pardot).	New	Task	Marketing	2/2/2023
Marketing Segmentation	Ability to create user lists for marketing. Open Issues: 1. Newsletters are not on Salesforce 2. Contacts - Not to identify Contacts that are Canada.	New	Task	Marketing	1/26/2023

Change Requests

Issue	Issue description	Status	Issue Type	Department	Date reported
Lead assignment rules	Have different assignment rules based on lead status and assign leads to different teams/systems. Rule: 1. Potential Super publisher/retailer versus equipment/retailer (Retailer), Other Retailer or Any Group (Commercial) 2. Potential distributor or new entity (1-2 Store Retailer or Company CRM) (Retailer) also into previous to change point.	New	Change Request	Marketing	2/2/2023
Inbound Leads	Automatically mark Leads created for HR Subject "Intends consultation (L2)" as unqualified and email HR with the lead details.	New	Change Request	Marketing	2/2/2023

Appendix II – Progress Review Sales (JCDecaux, 2023)

Progress Review [Sales] – 07/02/2023

Participants

-
-
-
-
-
-
-

Resume

In this meeting we covered the following topics:

- Advertisers
- Agencies
- Brands
- Contacts

A new version of the document [JCDecaux - Solution Review V2.pdf](#) was uploaded with all the Change Request identified in all the solution review meetings.

Action Items

Item	Item Description	Work	Item Type	Department	Person in charge	Date reported
Internal Integration	Internal integration	Done	Completed	IT	IT	07/02/23
Client Type	<ol style="list-style-type: none"> 1. Add Client Type (Agency - Advertising Agency) 2. Add client for each category and add to solution menu card 3. Add client for each category and add to solution menu card 4. Add client for each category and add to solution menu card 5. Add client for each category and add to solution menu card 	Done	Completed	IT	IT	07/02/23
Public Data Integration	<ol style="list-style-type: none"> 1. Add public data integration for all 20 products of New Client 2. Add public data integration for all 20 products of New Client 	Done	Completed	IT	IT	07/02/23
Integration with Hubly Market (Advertiser BMM)	<ol style="list-style-type: none"> 1. Integrate with BMM to add to each category and add to solution menu card 2. Add integration for each category and add to solution menu card 	Done	Completed	IT	IT	07/02/23
Integration - Advertiser	Integrate Advertiser with Platform to add each category and add to solution menu card	Done	Completed	IT	IT	07/02/23
System Integration	Integrate System One with Solution One and add to solution menu card and add to solution menu card	Done	Completed	IT	IT	07/02/23
System One - Advertiser	Integrate System One with Solution One and add to solution menu card and add to solution menu card	Done	Completed	IT	IT	07/02/23
System One - Advertiser	Integrate System One with Solution One and add to solution menu card and add to solution menu card	Done	Completed	IT	IT	07/02/23
System One - Advertiser	Integrate System One with Solution One and add to solution menu card and add to solution menu card	Done	Completed	IT	IT	07/02/23
System One - Advertiser	Integrate System One with Solution One and add to solution menu card and add to solution menu card	Done	Completed	IT	IT	07/02/23

Appendix III – CRM Salesforce PT - feedback July

CRM Benefits:

Dashboard: inter-company of top 50 clients > to be evaluated

National:

- Make more usage of 2 sales admin licenses
- Engage with sales managers on KPIs they will have from now on
- More dependent of recurrent clients (doing things on WOOD/Book-It) > Real-time integration with bookings is a must to make daily live better and avoid duplication of the work

Local:

- Better level of usage, also given type of proposal
- Check if Gustavo way of doing, could help minimize time spent since it seems he has a nice way to work and follow-up between salesforce and hive/wood

Airports:

- Document specifics needed makes that engagement is not very high > evaluate if process adaptation would help or in the future, if ~~could be a way out~~ could be a way out.

Database of contacts:

- Contacts without proper e-mail > xxx ~~com~~ e-mails fakes ~~com~~ (Other -xxx were already cleaned and sent by ~~when we kick-started~~)
- Import HubSpot contact by comparing different sources:
 - o Send a generic e-mail to check % delivery rate and see from them, what is worth it to classify

Evaluate with World IT:

- Sync with outlook to be able to press a button that opens the email
- Send an email to more than one client on specific products (commercial approach not just marketing need), being able to filter by sector/industry
- Leads: way to classify the client/lead in early stage.
- Patrimony: Link for ~~on each specific contract (new field)~~

In progress:

- One a one: from IT to ~~Most of~~

Patrimony:

- One a one: from IT to users to be done (put in practice) – extra training
- Include extra info:
 - o Quantity of

- o Integration with on contracts and ~~> object per formats, status do X frames Status mounted/dismounted, etc~~
- o Perceive the tool with real contract celebrated in July
- o Process:
 - User access and level of requests / PT Form: related to requests from municipalities/
 - Lead/task:
 - Lead: property owner who wants to make business
 - Task commercial: request of licensing or economic signalization

Marketing:

- Generate reports based on information unified under salesforce
- Mandatory to add marketing campaign when opening a new opportunity
- Improvement on email template for creation of a template inside salesforce (as we do in HubSpot)
- Start to have "marketing campaign" for special/seasonal projects since there is no tracking of how many opportunities were really sent
- Create a "email template" associated to marketing campaign could be a best practice
- Extra:
 - o Outbound to do not be lost of track
 - o ((Corp): way to track source coming from Instagram, ~~etc~~)
- Check the advanced marketing module relevance for both Portugal and Spain MVP2