



SCHOOL OF ECONOMICS
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The Strategic IS Decision-Making Process

The process of strategic IS decisions and potential consequences for implementation

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Abstract (English)

Since the early 1980's and up until today many organizations have realized the importance of paying more and more attention to the effective strategic planning of the information systems resources. There are several reasons for this that were recognized by Pyburn (1983), one was the high speed of technological progress both in regards to IT and Telecoms facilities. Another key factor, which is very valid for this research, is the application of these facilities in problem domains which have a critical impact on an organizations success in performing its tasks. When new areas of opportunity for such applications grow constantly it has become more and more complex to match the operational, tactical, and strategic needs of the business with the appropriate systems activities.

With this thesis we wanted to research how the Executive management of an international corporation handles the demands for key IS functionality in relationship to their desire to get a "Go"-decision for a strategic IS implementation project.

Our method to either prove or disprove our hypothesis was to perform a case study through semi-structured interviews. We were given a unique opportunity in our research to be able to interactively follow an ongoing decision-making process at an international corporation in the process of doing a *feasibility study* for a strategic IS project.

The result of our research shows a much more drastic picture than we had ever expected. We concluded based on our empirical findings that issues that eventually lead to the potential failure of an IS investment starts even before the "Go/No-Go"-decision is being made.

The results of our research contributes to the existing literature in this field by offering deeper insights into the strategic decision-making process and the effects of concessions in functionality in an IS system in order to achieve the desired decision, despite potentially negative consequences for the implementation.

Keywords

Functionality, Organization, Decision-making Process, Decision-making, Information Systems (IS), IS planning, Feasibility study

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Key terminology and definitions

Customer Relationship Management (CRM) - is the strategy for a company to handle interaction with customers, the principal focus is on sales activities. CRM covers sales, marketing, customer service and technical support.

Feasibility Study - The feasibility study looks at the viability of an idea. It puts the emphasis on identifying any potential issues and tries to answer the question: Is the idea workable and should one proceed with it?

Features - features are the “user tools” inherent in the product used to perform the functions, i.e. mobile phone, the dial tone and the touch-tone keypad are features used to accomplish the phone’s function.

Functions - Functions are the “product’s answer to the set of user tasks”, i.e. placing a telephone call is a function.

Go/No-Go - Determination to proceed with or abandon a plan or project. In quality control, 'go' denotes that a product conforms to the specifications; when it does not, it is 'no go.'

Hard values - Gain, defined in a Cost-Benefit-Analysis (*CBA*) or Profit in the Return-On-Investment (*ROI*) analysis of the proposed system.

Information System (IS) - A combination of information technology (IT) and people's activities when using the technology in order to support the operations, management, and decision-making of an organization or individual.

Management - Management is a process for steering the activities and efforts of the organizations members in a controlled fashion in the direction of the objectives. It can be defined as “making something happens” and it is focused strongly on the operational level of an organization. Management is an active role, it involves working with and developing people, reaching targets and achieving objectives.

Organizational Politics - Pursuit of individual or local (tactical) agendas and self-interest in an organization without regard to their effect on the overall (strategic) organization's efforts to achieve its goals.

Soft values - Perceived and wanted key benefits and associated functions of the proposed system

1 Background

Our interest in this subject was originally triggered by practical experience of strategic IS implementation projects combined with reading about the high *perceived* failure rate among IS implementations (Moløkken & Jørgensen, 2003; IT-Cortex, 2010). Failure numbers of 50% or higher were read about.

We have used two different sources for survey statistics on IT project failure rate; Moløkken and Jørgensen (2003) and IT-Cortex (2010). One that is often referred to is “The Chaos Report” by the Standish Group (1995) (Moløkken & Jørgensen, 2003), but we have also added other surveys and reports that are referred to in these compilations. Most of the reports we have seen define 3 major definitions of failure;

- Failing to meet requirements
- Failing to deliver on-time
- Failing to meet budget

A series of surveys were gathered, compared and presented by Moløkken and Jørgensen (2003). They collected information from ten surveys performed between 1984 and 2002. The total number of respondents was 1850 with an average response rate for the surveys of 35%. The results from the surveys presented that were investigating the frequency or magnitude of overruns are presented in the following table:

Table 1-1 Estimation accuracy result (Moløkken & Jørgensen, 2003, p.4, table 2)

Study	Jenkins	Phan	Heemstra	Lederer	Bergeron	Standish
Cost overrun	34% (median)	33% (mean)			33% (mean)	89% (mean)
Projects completed over budget	61%		70%	63%		84%
Projects completed under budget	10%			14%		
Schedule overrun	22%					
Projects completed after schedule	65%		80%			84%
Projects completed before schedule						4%
Published	1984	1988	1989	1991	1992	1994

The outcome of this comparison shows that the issue with failed IS implementations is valid, even though the reasons may vary. It is noteworthy that “*functionality*” is not mentioned as,

based on other surveys outcome, it could be assumed to be a key to defining success or failure of an IS-implementation.

According to Moløkken & Jørgensen (2003) the reason is that actual degree of delivered functionality is very hard to measure as it is a matter of opinion. None of the surveys they looked at were concerned with the opinion of the users regarding the degree of delivered functionality. The Jenkins study did mention the manager's opinion, and stated based on that that 72% of the users were satisfied, while Phan's survey that an estimated 70% claimed that requirements and expectations of the users were met. This contrasts sharply with the Standish Group's (1995) claim, according to Moløkken & Jørgensen (2003), of only 7.3% of delivered projects actually fulfilling the originally specified requirements.

The summary of this research into the failure of IS implementations tells us that most of the projects, est. 60-80%, are completed over budget and/or over schedule. There are also indications that the size of the project is an important factor, with the percentage and magnitude of overruns increasing as the projects grow in size. The average likely overrun of cost and effort is estimated to be around 30-40%. (Moløkken & Jørgensen, 2003)

Further research into other surveys (IT-Cortex, 2010) covering the same issues (see table 1-2) supports the fact that there are a substantial number of IS implementations that fail in one aspect or another.

Table 1-2 Research on amount of failed IS implementations (IT-Cortex, 2010)

Study	Chaos Report by Standish Group	Robbins-Gioia Survey	KPMG Canada Survey	Conference Board Survey	OASIG Survey
Key findings	31.1% of projects cancelled. 52.7% will cost over 189% of original estimates. Projects completed by the largest US companies have only approx. 42% of the original features and functions.	51 % ERP implementation unsuccessful 56 % has a program management office (PMO) of these only 36 % felt their ERP implementation was unsuccessful	Over 61 % of the projects that were analyzed were deemed to have failed by the respondents.	40 % of the projects failed to achieve their business case within one year of going live.	Bottom line, at best, 7 out of 10 IT projects "fail" in some respect.
Published	1995	2001	1997	2001	1995

We can see here that though the numbers vary the outcome still shows that there is an issue with a relatively large number of IS implementations failing in one aspect or another.

It is interesting to note that despite differences in sample sizes and criteria etc, all the studies we have found do corroborate each other in their uniform findings of the fact that IT/IS-project failures is a serious business problem. More than 50% of the projects that have been

looked at over the time span of these surveys fail to deliver promised features and/or are delayed in regards to completion and/or overshoot their budget.

Our background research, including The Standish Group's Chaos Report (1995) (Moløkken & Jørgensen, 2003), shows the use of three common key areas of questioning among the surveys to establish success or failure of an IS implementation;

- Did the project deliver the expected value (functionality)?
- Was the project completed on-time per the original schedule (on-time)?
- Was the project completed within the approved budget (on-budget)?

This in combination with the results presented in this background chapter shows that these are valid starting points for establishing the key issues of the definition of failure in many cases, i.e. is the project; *On-budget*, *On-time* and delivers originally proposed *Functionality*?

From the perspective of our research we see that the combination of cost-time-functionality is the key. Moløkken & Jørgensen (2003, p.7) says that "*The reasons for overruns are complex, and not properly addressed in software estimation surveys*". Based on this statement and the importance of the combination of cost-time-functionality for defining success or failure we begun to see a potential for what we see as an often overlooked pattern of cause and effect.

We asked ourselves; "*Could it be that removal of key functionality by the executive management, as initiators of the strategic process, cause the time and budget overruns in order to get a "Go"-decision for the IS project, and that these overruns are caused by their efforts to compensate for these changes at a later stage, leading to the perceived failure of the implementation?*"

1.1 Problem area and research hypothesis

As we can see a large number of IS implementations are considered failures in different ways. Based on the apparent lack of available data regarding the impact of the strategic decision-making process on IS implementation, this aspect looks to us to be a marginalized or even ignored factor despite its potential impact on the success or failure of an implementation. Since most of the research we have found is done "*post mortem*", i.e. after completion of project, the outcome of could have a strong bias in the responses given, based on personal defence mechanisms triggering responses for self-protection when giving reasons for failures by management and project participants.

Based on practical experience from IS implementations in combination with the data from the background research we have formulated our *hypothesis* which states that during the *feasibility study* phase of the strategic decision-making process;

H₀ = "Executive management makes concessions in functionality in order to achieve a "Go"-decision, potentially leading to project failure."

Our purpose with this study is to show and describe how the “*Gap*” created by the sacrificing of *functionality* (*soft values*) on part of the management in order to achieve a strategic “*Go*”-decision based on the Cost-Benefit-Analysis (CBA) and expected Return-Of-Investment (ROI) (*hard values*) potentially leads to the eventual failure of a global IS-implementation.

1.1.1 Expected outcome

Our intention was to follow the “*feasibility*” stage preceding the strategic “*Go/No-Go*”-decision at a medium sized Swedish corporation with a global market, regarding their decision to implement a new IS.

We expected to find that the handling of the strategic decision-making process has a high impact on the executive management’s “*Go/No-Go*”-decision for a global IS project, due to the intentional removal of functionality in order for the project to get a “*Go*”.

We also expected to find that this will influence the same managements future decisions and actions during the implementation process, an aspect that we think is often underestimated or ignored when evaluating the success or failure of an IS implementation.

1.2 Delimitations of this thesis

From our perspective within the scope of our research for this thesis we will focus on the strategic decision-making of our case study. Mintzberg, Raisinghani & Theoret (1976) define a strategic decision as:

“...important, in terms of the actions taken, the resources committed, or the precedents set.”
(Mintzberg et al., 1976, p. 246)

Based on this we define the decision of implementing a new IS for an entire global organization to be strategic.

Organizational theory means different things to different people; we will limit our focus in this research to one specific aspect – the relevance of organizational theory to the strategic management decision-making process of the corporation.

The case Company’s management requested anonymity which may limit the amount of information presented as far as comments, thoughts etc may point directly to the actual source. We have therefore coded names, locations etc within this thesis.

2 Literature review

In this chapter we present previously done research and theories that has a bearing on our own research for this thesis. Our focus has been on creating an understanding of the perceived gap between current IS methodology and the feasibility study performed before a strategic decision in an organization related to strategic IS implementations.

2.1 IS project methodology

The information systems area is still characterized by constant technological change and innovation. The researcher in the field of IS therefore often find him- or herself trailing behind the so-called practitioners when proposing changes or when they evaluate methodologies for the development of new systems. In his study on strategic planning Pyburn (1983) used a case study to investigate ongoing IS strategic planning processes in a number of companies. He wanted to understand why some methodologies worked and others not by examining the context, both business and technological, within which the plans were developed.

Pyburn's (1983) motivation for the study was the growth of the importance of such strategic planning for the success of the overall corporate IS development effort in combination with the apparent lack of effectiveness of existing IS planning methodologies, leading to the apparently still high failure rates of IS implementations.

The major issue for the planner is selecting one planning method over another. Little evidence was provided to which factors influence the failure or success of any specific approach. It was found that it was very *difficult to operationalize* most of the planning approaches outside their original context. And there are few reports of cited planning disasters in the available "IS implementation" literature. Despite the availability of normative models, which work for one or maybe two companies, there is a lack of generalization-able guidance. (Pyburn, 1983)

The difficulty of the *operationalization* of the planning, found by Pyburn (1983), led us to look at some of today's better known models for software development to get an understanding of to what degree they handle the feasibility phase of a new IS project. As our interest lies in the early stage of software implementation, the following summaries will focus on those aspects of the models we found to be most often brought up in the literature; the Waterfall model, the Spiral model, and SCRUM (Sommerville, 1996).

Royce (1970) splits up the Waterfall model into system requirements and software requirements as two different steps in his version of the model. In the final summary of the model there is a notation about system requirements generation, but not as a step in the staircase. What this implies is however not mentioned.

Each round in the Spiral model ends with planning for the next round, and is named “Requirements plan” by Boehm (1988). Boehm (1988) says that this leads to a “round 0”, a round for planning for the first “real” round. This round is referred to as a *feasibility study* that looks at the project as a whole with reasonable costs, alternative solutions and so on. This is however nothing that is visible in the model per se.

There are three main stages in SCRUM; planning, sprints and closure (Schwaber, 1995). During the planning-phase a definition of the coming release is created, along with other various types of information necessary for the project to be able to move forward. There is no mention of a *feasibility study* in any of the stages.

These models do not seem to take into consideration the decision-making process as a part of the project, from original problem perception all the way to final implementation. This process begins with the reason(s) “Why?” the IS should be implemented. Their focus is on the “What?” to implement and “How?” to do it as parts of the system development and implementation plan. One can argue whether the context of the “Why?” really lies within the scope of the responsibility of the models or not. However, this link to “reality” i.e. an understanding of the needs of the business and the business processes supporting it would seem to be a relevant starting point for any IS implementation.

Some of the software development models do state that there should be a form of *feasibility study* preceding them. They do not tell us how to do this or how to implement the outcome of this step into the model. It points towards a gap between the “Why?” on one hand and the definition of “What?” is needed and the “How?” on the other.

2.2 Feasibility study

When making any kind of great or important strategic decision, some kind of background information is generally needed to base the decision upon. In the case of such a large and important decision as the one of a global IS implementation this could take the form of a *feasibility study*.

The feasibility process is too important to be left to technologists and should instead be made in close contact with senior management of the firm who should follow the project throughout the process to assure that the needs of the organization are taken into consideration (Lucas, 2005).

The first step in this is often a SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis. It is considered the most common practical tool for analysis and strategic planning that is actually being used by both consultants and business executives (Piercy & Guiles, 1989).

2.2.1 The SWOT analysis

The SWOT analysis approach is effective if focused and can be a dynamic and productive tool in the strategic decision-making process. (Piercy & Guiles, 1989)

Due to its relative simplicity the SWOT analysis is seen as an excellent vehicle for planning teams and executive groups in an organization. Its simplicity makes it easy to use and therefore does not imply any need for external “experts”. The payoff is in;

- Pooling of ideas and information from several sources provides a richer result
- Providing a concrete mechanism or tool for the expression of team consensus on issues
- Its creation pushes the team towards a unified agreement around its components

A SWOT analysis used correctly can be an excellent tool to create a shared vision among the participants, in our case the executive management, of the perceived issue or problem that the organization faces. (Piercy & Guiles, 1989)

2.2.2 Requirement engineering

It's estimated that delivered systems often does not meet customer requirements partly due to poor Requirement Engineering (RE). This may be due to the view that RE is a time-consuming, bureaucratic and contractual process (Easterbrook & Nuseibeh, 2000). "Real-world goals" is an important part of good RE, but Lamsweerde (2001) reports that goals have been largely ignored as a part in the process of RE in the literature regarding software modelling and specifications, as well as in object-oriented analysis.

A goal is not achieved by a specific function of the system but instead by a combination of many functions working together. The achievement of a goal might even include other systems and the involvement of humans. (Lamsweerde, 2001)

Easterbrook & Nuseibeh (2000) ties the process of RE to the project's feasibility as it plays an important role in estimating the project's cost due to the technical specifications and the assumed price for required equipment.

But there is more to RE than just the technical specifications. It's a process prior to the developments methodologies that is intended to generate all the system requirements for the system which is needed for the implementation. This kind of pre-study phase has been given many different names over the years, such as context analysis, definition study, participative analysis and so forth. The objective of this process has been to analyse organizational, operational and technical setting of the particular IS to be able to point out problems and opportunities. To meet these problems and opportunities certain goals are set which are then elaborated into requirements of the new software. (Lamsweerde, 2001)

Easterbrook & Nuseibeh (2000) describes RE as targeting the understanding and acceptance of the “real-world goals”, which for us represents both the “*Why?*” and the “*What?*” of the system. RE also has to concern itself with an understanding of beliefs of the stakeholders in

the project in order to be able to validate the requirements. The language is then an important aspect to be taken into consideration so that all stakeholders are on the same track and have the same understandings, which hopefully will contribute to reducing conflicts and confusion later on. (Easterbrook & Nuseibeh, 2000)

2.2.3 Cost-Benefit-Analysis and IS projects

The CBA is a variation of the ROI model in which costs and benefits and intangibles all have monetary values assigned to them and form a part of the ROI calculation. The CBA is used in public-decision-making, but has found an ever increasing use in the appraisal of IS investments. (Farbey & Finklestein, 2001)

When it comes to the "Go/No-Go"-decision in going through with an IT investment, Lucas (2005) mentions two critical questions to be answered in order to prove the investment:

- What is the value of investments in IT?
- What type of return comes from investing in IT?

These questions are important to answer since this kind of investments generally involves a great deal of capital. It's for example estimated that around 50 percent of U.S capital investments concern IT. Such rigorous investments require some kind of benefit or return. (Lucas, 2005)

The investment of the new IT probably has a quite precise price, as its value is measured in monetary worth. This should then be compared to the expected benefits, which can be difficult as the value of these might have a very remote connection to actual income. For example might certain functions help managers and other employees to do their job in an easier or better way, but it's a difficult process to measure the exact value of this and to compare it to the monetary value of the actual investment. It might in some cases be almost impossible, at least at the moment when the decision of investment is made. It's also rare that companies take the effort to conduct such a post-hoc analysis. (Lucas, 2005)

Lucas (2005) moves on to describe his "IT investment equation" where P is the "probability of":

$$P(\text{Success/Return}) = P(\text{Return on Investment Type}) * P(\text{Conversion Success})$$

The problem with the equation is to put in the right values. Estimations have to be done regarding what different options are worth for the company versus the price of it and if there is a market for it. The difficulties also include how to measure the return of a system that is a competitive necessity or the use of a technology that is the only way to manage the task. A suggested way to go around this is to try to estimate the cost of *not* investing. (Lucas, 2005)

As these benefits remain very difficult to measure there is a large risk of underestimating costs or assigning notional figures to them that may have no connection to reality. There are people who suggest that the benefits are so obvious, just by observation, that no measurements are needed. Not everyone agrees with this though, and in particular senior

executives and finance directors are searching for a way to put numbers to this as IT/IS costs grow. (Fitzgerald, 1998)

CBA has often been used to justify investments in IT/IS focusing on efficiency. The purpose of these, often administrative, systems has generally been displacement of labour costs. The cost of computerisation was then compared to the benefits of savings costs of jobs that could be spared under a certain timeframe. This is an easy way to calculate but has often showed to leave other important factors aside, which have led to expensive surprises. The benefits of saved labour costs have been largely decreased since most companies already have replaced their manual systems with computer systems and there is therefore not as great cost savings to be had this way as there used to. (Fitzgerald, 1998)

Another type of IT/IS investment is projects of the effectiveness type. These are projects that instead of aiming on how things should be done are aiming at what to do and different ways to best reach that goal. This means, not to simply reduce the cost of current tasks, but instead find completely new ways of working which better reaches the desired results i.e. increased revenues, better service etc. These are types of benefits are not as easy to calculate as with the displacement of labour. Not only must the benefits first be identified, they would then also have to be recognized by the recipient of the benefit who also has to be able to value it. (Fitzgerald, 1998)

“Evaluation of IS/IT investments is a notoriously difficult area. Some doubt that IT investments are ever really productive; others point to mismeasurement as a major reason for such a conclusion and for the so-called IT ‘productivity paradox’.” (Fitzgerald, 1998 p.15)

The most common technique for evaluating an investment decision is the CBA, and then ROI or a similar calculation is done to try to compare or verify the economic contribution or impact of the decision. It is both interesting and important to note though that it is not necessarily the project with the highest economic impact that gets its funding first, despite the fact that there is always a limit to funds and resources available for investment. This happens since there are additional factors, above and beyond the economic and measurable ones, that are considered when looking at the overall management decision process. These factors are not necessarily easily measured but are often an extension of the management’s strategic view for an organization. They can be competitive advantage, management information, customer satisfaction and strategic IS architecture. There are also the risk factors to consider regarding a decision, i.e. organizational risk, IS infrastructure risk when implementing changes etc. (Parker & Benson, 1990)

We expect, through our line of questioning, to find out if and to what extent the factors seen as an extension of the executive management’s strategic view have an impact on the decision-making process of our case study.

2.3 The Organization

The structure of an organization provides the coordination of efforts to achieve the goals and objectives of the organization. It is important however to recognise and understand that whatever type of structured (*formal*) organization there is, there is also an unstructured (*informal*) organization present. One of the key functions of the informal organization that Mullins (2010, p.95) brings up that we see as relevant to our research is that it provides an *additional channel for communication*. (Mullins, 2010)

Rank (2008) has done a qualitative study of formal vs. informal organization structure, using two companies for a case study. There were two findings that could well have an impact on our research through the choice of interviewees that we are provided by the Company:

- (1) *formal horizontal ties are much more likely to be disregarded than formal vertical ties*
- (2) *a significantly greater number of informal ties are built and maintained in a vertical rather than a horizontal direction.* (Rank, 2008 p.145)

Based on this we understand that the informal relationships in the organization do not work as a complement to the formal, but is rather used instead of the formal structure. We also see, based on Rank (2008), that in the strategic decision process there is a disregard of formal cooperation if it is a horizontal relationship, i.e. it connects two managers at the same hierarchical level. This show the importance for us to understand the difference between the two forms of internal organizations, and to get grasp of how they interrelate within the context of our research. For instance the difference between countries involved in the handling of requests for feed-back and information including the executive managements handling of the distribution of data and information during the *feasibility study*, i.e. if and how much they share relevant information regarding their planned IS implementation will affect how the involved parties respond to the project.

The information we found gave us a better understanding of the fact that individual factors and goals can have an effect on how the individual understands and accepts the organizational goals and that there are ways that they, based on their position in the organization can have an impact on the decision-making process. We also understood that there are organizational differences in different countries and that this, despite the same role description, can affect the power of the individual to have an impact on the decision-making process. (Mullins, 2010)

2.4 Decisions and the process of decision-making

In their research regarding strategic management Eisenhardt & Zbaracki (1992) writes that the strategic decision-making process is best described by the interweaving of bounded rationality and political processes. The political perspective, which creates the social context, comes into play as the strategic decision makers do engage in politics and the most powerful and influential among them determine the final decision.

Decision-making can often be a tough task for an executive. It's an important task that involves great risks and a possibility of damaging the business if the wrong decision is made. For the executive to be able to make a good decision he/she needs a great deal of background information to base the decision upon. If this information is not provided or faulty, it gives the decision maker false premises which probably will lead to a bad decision. (Hammond, Keeney & Raiffa, 1998)

An important aspect of the decision-making process is to provide a common direction for team members, in our case the management team. Understanding is the key to this. If the individuals in the team share a common understanding of the underlying rationale behind the decision, they can act independently, but still be consistent with the actions of the other team members, and be consistent with the original spirit of the decision. It is also important to achieve a commitment from the team members to the decision since this will reduce the likelihood of any particular decision being met by counter-efforts or disinterest. (Guth & MacMillan, 1986).

The major characteristics of a strategic decision-making process are its novelty, complexity and open-endedness. The reason for this is that an organization when it comes to strategy begins with little or limited understanding of the situation they are facing as well as any path towards a solution. In order to reach a final choice the organization has to go through an iterative and at times discontinuous process that involves a number of dynamic factors. This will be done in several steps over a longer period of time. (Mintzberg et al., 1976)

Rank (2008) in his research has noticed that managers that according to the formal structure should cooperate with one another often avoid doing so during the strategic decision process. In his research he noticed a potential difference in reasoning behind this, at lower-level management the predominant factors were career concerns and the problem solving capacity of higher-level management, while among the higher-level management the preference for more vertical informal contacts is their greater business involvement, and the preference for a more direct cooperative relationship. (Rank, 2008)

From our perspective the general aspect of decision-making theory is acceptable for us, though we have to apply it within the context of the scope of our research to be able to apply it properly to our line of questioning.

2.5 Organizational politics

Eisenhardt & Zbaracki (1992) suggests three important ideas that are central to the political view of an organizations strategic decision-making:

- Organizations are made up of people with at least partially conflicting interests
- The strategic decision-making is political in the sense that powerful people get what they want
- People in an organization will use political tactics as forming coalitions and use information to enhance their power

Traditionally the political behaviour in an organization has been seen as based on actions related to claims against the pool of resources of an organization. In his study of the decision processes that were employed when purchasing IS equipment Pettigrew (1973) defined the political process as, generation of demands for resources, and the subsequent mobilisation of support for the demands generated. This does not necessarily imply that all claims against an organization's resources are political. Mayes & Allen (Mayes & Allen, 1997) provide an example;

“For example, an employee's asking for a salary raise, which constitutes a claim against the resource sharing system, would not be political behavior, but the use of threat to unionize to obtain a raise would be considered a political act.” (Mayes & Allen, 1977, p.673)

Cyert & March (1992) suggests that the process of budgeting is the outcome of organizational bargaining. In Wildavsky (1968) politics in an organization is looked on as a conflict that decides whose preferences will prevail when policy is determined. Cyert & March (1992) do not agree as they see it as too limiting to define politics as a conflict over policy decisions. They propose that the definition of Organizational Politics “...must include the politics of policy implementation as well as the politics of policy determination.”

Wamsley & Zald (1973), in their work on public organizations, defines the structured usage of authority and power as tools to be used to set goals and directions for the organization and its economy.

Set in the perspective of our original definition of the organization, and why it exists, these definitions all have certain validity. But with the focus purely on the scope of our thesis Wildavsky's (1968) and Wamsley & Zald (1973) definitions are sufficient, as they are both suitable for the upper level organizational management that we are studying.

From a political perspective on IS implementation, resistance to change can be an important factor to consider. Markus (1983) states that this does not necessary imply any type of system failure, neither is it necessarily a negative outcome. Markus (1983) claims that resistance can be an important positive factor because it can in itself effect change, either openly or more covertly in the system design, leading to changes in the organizational impact that are rather different from the original intentions. This shows the importance of desires, motivations and also intentions of the key actors in an IS project. The political perspective can explain how the consequences of loss of power and control can lead to resistance and therefore changes in the usage of the system from the original intentions. (Markus, 1983)

We approached this area with questions regarding who the interviewee's cooperated with and what they saw as their role in the decision-making process. We also asked which functionality they would be willing to concede to achieve a “Go”-decision, and how they would approach trying to get the original functionality back into the system after a “Go”-decision was made.

2.6 Our case research model

Our initial understanding of our problem area, the potential failure of IS-implementations, we achieved through publications pertaining to factors influencing the success/failure of the implementation of IS (Moløkken & Jørgensen, 2003; IT-Cortex, 2010). The issues we identified with *cost-time-functionality* lead us to look at the strategic decision-making process to get a better understanding of the process behind the decision to implement a new IS in an organization.

We then began to perceive a pattern of what we defined as an *information gap in the decision-making process* between the information leading up to the “Go/No-Go”-decision and the actual project execution. We chose to synthesise what we saw as an overlooked factor in the strategic decision-making process leading up to the potential failure of IS implementations into our key hypothesis;

H₀ = "Executive management makes concessions in functionality in order to achieve a "Go"-decision, potentially leading to project failure."

Based on our available theory and our hypothesis we designed our case research model. The model begins with three basic questions;

- “Why?” is the new IS needed?
- “What?” functionality will it have?
- “How?” will it be implemented?

Using these three questions, the “Why?”, “What?” and “How?” as a framework, we placed them into the process of data and information gathering regarding the area of a strategic IS decision, thereby creating our case research model;

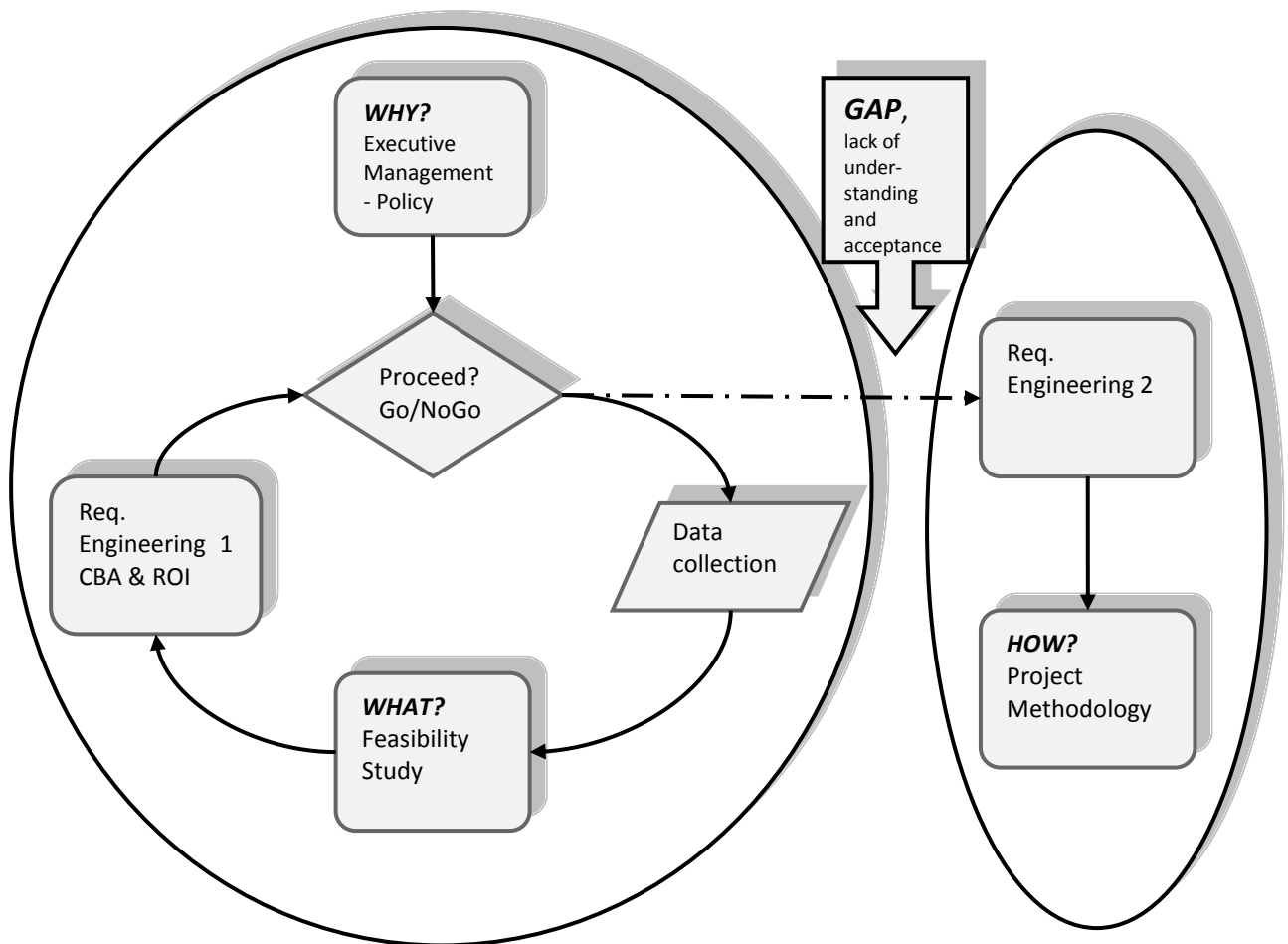


Figure 2.1 Our case research study model

The understanding of “Why?” includes a “problem to be solved”-description with a SWOT-analysis (Piercy & Guiles, 1989) and is the basis for the “Go/No-Go”-decision to be taken at the level of the executive management in the case of a strategic IS implementation decision.

To gather this data and information in order to get a better understanding of the needs of the organization, related to the problem, the executive management initiates a *feasibility study*. This study results in a report to the executive management on “What?” is required from the organization’s point of view to solve the problem that initially generated the “Why?”. The study contains a CBA (Lucas, 2005) and a list of requirements for the functionality of the proposed IS implementation (Easterbrook & Nuseibeh, 2000; Lamsweerde, 2001).

If a “Go”-decision is made by the executive management, the collected data and information from the *feasibility study* regarding proposed functionality is delivered to the project management team for implementation.

Here we perceive an *information gap*, as we have not found any clear and concise form for transferring this data and information into currently available IS project methodology. This supports Pyburn’s (1983) issue with the difficulty of operationalizing the planning, and is what potentially can lead to a failure in the “How?” to implement the strategic IS.

With our interest being in the motivations and actions of the actively involved management in the early stages of an IS project, i.e. the *feasibility study*, our research will foremost focus on the strategic goals of the organization and how the executive management approaches this and what motivates their decisions. We will also try to establish the roles of the people involved in the process leading up to a “Go/No-Go”-decision, and their possibility to affect the final outcome based on their understanding and acceptance of the proposed IS system. To be able to see this we decided to use a case study in order to gather empirical data to support our claim for a “Gap” in the overall process in accordance with our hypothesis.

3 Methodology

With our choice of subject for the thesis “*The Strategic IS Decision-Making Process*”, and our focus on its effects on IS project planning & implementation we decided to create a structure for our research. We began by drawing up the following thesis development plan;

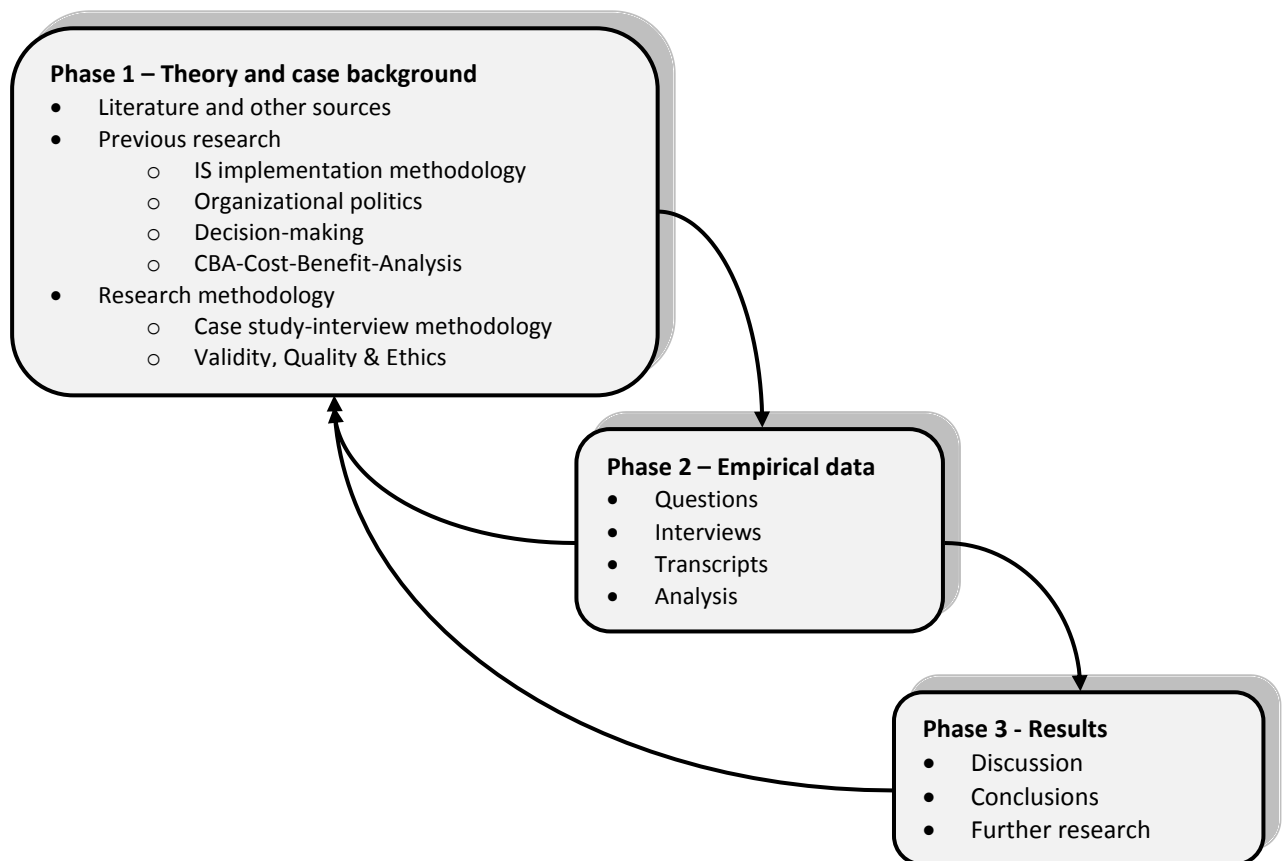


Figure 3.1 Thesis development plan

This plan included iterations as new data and information gathered over time lead to previously collected data and information having to be revised or even removed. This in turn lead to new angles and more in-depth research in areas previously studied, even to revised conclusions.

3.1 Phase 1 – Theory and case background

3.1.1 Literature and other sources

When we started looking for literature we quite quickly realized that since our focus with the research was not the IS itself, but the process of how a strategic decision is made for the starting of a large IS project in an organization our research took us into the area of organizations as social structures.

This meant that rather than focusing on creating a strict theoretical framework, we had to build a framework around the understanding of the organization as a context and the individuals acting with this context. First we had to make sure that we had an understanding of where current IS implementation methodology begins and ends in the project process. We therefore looked at what we could find about the most mentioned methodologies in articles on IS implementations. This gave us a shortlist of three of them that we have presented shortly in our theory (see chapter 2); we found that even though they are relevant to understand where our perceived issue could occur, they do not adequately cover our topic for this research. What we did find was the *feasibility study*, which became the basic description for what our case company had chosen to do at this stage.

To understand the executive managements perspective better we also had to understand the basics of a CBA since our literature (Farbley & Finckelstein, 2001; Lucas, 2005) pointed to its ever increasing use in IT and IS investment decisions.

We then proceeded to look at literature and articles on organizations to give us a good grasp of what defines an organization. Because of the focus of our research we looked at material related to organizational politics and the decision-making process, both which were important for our understanding of the issue we were approaching with our hypothesis. Without an understanding of how an organization goes about its decision-making and which possible aspects could influence our interviewee's answers, the formulation of "neutral", as in unbiased, questions for the interviews would be almost impossible to achieve.

It was interesting to note that a large part of the original literature around these subjects was quite old, i.e. Wildavsky (1968), but obviously still valid as they were being referred to in the more modern material, i.e. Mullins (2010). We found that though IT and IS technology and methodology has developed, basic organizational definitions still hold true, the biggest change is how the individual is seen. The major change over time is that the individual's role and responsibilities, both formal and informal, in the organization has become more seen as a key factor in the understanding of the workings of the organization (Mullins, 2010). For us this understanding shaped the content of our follow-up questions in the 2nd round of interviews with our interviewees regarding their role in the organization and possible influence on the final decision.

3.1.2 Research methodology

When we set out to do this we decided early on to make a *case study*. The hard part here being finding a company that was in the very early stage of a strategic decision-making process for a large IS project. The Company also had to be willing to let us get inside their project organization as well as their operation in order for us to get the full picture. We had to focus on building trust with the all the people we wanted to meet, from the executive management to the individual project member. This worked out quite well and we were given access to all the original material used by the executive management in the process up to the point where we entered. They also gave us access to key people actively involved in the project for our interviews.

We choose to make a case study as the best way for us to get access to solid empirical data regarding the focus of our hypothesis. While initially stating that there is no standard definition of what a case study is, Benbazat et al (1987) still gives us a good definition of a case study that we will use in our work;

“A case study examines a phenomenon in its natural setting, employing multiple methods of data collection to gather information from one or a few entities (people, groups, or organizations). The boundaries of the phenomenon are not clearly evident at the outset of the research and no experimental control or manipulation is used.”(Benbazat et al., 1987)

The case study can be used in many different areas and situations. It can be related to the knowledge of phenomena relating to individuals, groups or organizations. It can be social or political. A case study should allow us as researcher(s) to keep the holistic and meaningful characteristics of events occurring in real life. (Yin, 2009)

By this definition we concluded that our hypothesis is well suited for doing a case study, as we are looking at the phenomena of strategic decision-making within an organization. We have used internal documents and interviews to gather relevant data and information from several entities within the organization. We could not control the on-going process but we had to be careful so that our questions were not biased by our inside knowledge. This included avoiding any intentional manipulation of the people involved by asking “leading” questions to get specific responses, rather than getting the interviewee’s own view.

3.1.3 Case company description

The decision-making process we wanted to follow should preferably be at an international corporation in the process of looking to implement a new strategic information system (IS). To be able to do this we got in touch with the executive management at the Company in order to have them agree to let us run a series of interviews with key people in their organization regarding their ongoing *feasibility study* for the implementation of a new global CRM-system.

The Company is international with active business interests in about 20 countries around the world. They are divided into a number of divisions working with different product lines. The company initially grew organically and through minor acquisitions, but during the last five to six years it has also grown by acquisitions of other more extensive operations in new markets.

The Company employs over 2000 people and has manufacturing, research and development (R&D) and sales offices in several countries.

Today the Company runs a number of local solutions for their IS needs. The executive management feels strongly that a more centralized solution for sharing of information should be implemented. In the management's opinion a common system to support the more global business processes would be highly beneficial.

The Company's business is profitable and they have already performed major cutbacks and restructuration in the organization.

3.1.4 Case study interview methodology

We decided that we wanted to do a series of interviews over time to get a longitudinal view, i.e. to capture any changes in the decision-making process happening over time. We also decided that the interviews should be made up of three to five open-ended questions based on our understanding of the focus of our research, within the context of an organization, from the theory and limit any input based on our own experience to avoid bias. The importance of the open-ended questions was to give the interviewees a chance to add their own perspective and thereby provide us with additional data. Yin, K. (2009) points to a number of important factors to consider for a good investigator in a case study:

- Ask good questions
- Be a good listener
- Be adaptive and flexible
- Have a firm grasp of the issues being studied
- Unbiased by perceived notions

Good questions are based on a good understanding of the subject being studied. In our research through the theories and previous research done by others we have strived to get a solid understanding of the context of an organization, its management and decision-making processes. A case study data collection process follows a formal protocol but there is no easy way to predict which specific information may become relevant. It is important that we as researchers use our own understanding of the issue and the answers received to the initial questions so we can establish good follow-up questions that lead up to a more in-depth understanding of the phenomenon being researched. (Yin, 2009)

The quality of the answers we got to our initial and follow-up questions defined how well we had understood the context of our research as it relates to our hypothesis. I.e. do the answers given clearly prove or disprove it.

Another important aspect to consider is bias when it comes to reliability, as reflections from previous experience colour our interpretations in different situations. The human mind is highly affected by culture, social, gender, class and personal politics. This reflects in our judgement and is therefore important to be aware of. (Creswell, 2007)

Different researchers have different backgrounds and have therefore differences in their worldviews (Creswell, 2007). This becomes a problem when it raises questions and opinions around how findings from research should be interpreted and can shape an “objective” investigation in a certain direction (Ehrlinger et al., 2005).

In our case this was reflected in our own backgrounds with a mix of business and management experience giving us insights and biases that may have influenced our research. We were however aware of this and constantly questioned our approach to the subject to try and trace the influence of our interpretations and conclusions related to the actual facts of our empirical data.

The greatest dilemma with bias however is that one easily can detect someone else’s bias while it is often harder to see one’s own, even if looking for it, as it works below the surface. To be aware of your own bias is however very important to be able to counteract it in some way. (Ehrlinger et al., 2005)

In this we saw, through our whole process, the value of being in a team when looking at and questioning steps taken along the way. During our research we have had a number of discussions both before and after our interviews regarding these points, so as to actively try and minimize bias and/or leading questions.

Another possible bias that we are aware of was the formulation of our research hypothesis where we made an assumption based upon our own experiences and worldviews. We are aware of this and a large part of our work was focused on objectively trying to see if we could either prove or disprove this view of our subject.

It was important that we were honest in our assessment of our capacity in every one of these areas and realized our limitations. For instance we could not have a better practical understanding of the actual processes within the Company than the executive management running it, as we have never worked there. We may however have provided insights to them based on our studies and questions, which can help them to improve some parts of their organization and its processes.

Yin (2009) states that to design a good case study it is important to both collect, analyze and present the data fairly. It also important that a case study is summarized in a written report that is compelling to its reader. The researcher should always keep in mind the focus of the study/research being done. There are three principles for data collection presented by Yin (2009);

- Using multiple sources of evidence – triangulation and convergence of evidence to establish facts
- Create a case study database - organizing and documenting data for reliability
- Maintain a chain of evidence – to establish the path from question to report

Failing in any of these may lead to a failure of the whole study and we have strived hard to upkeep these criteria in our research. Multiple sources and triangulation for us in our research has been the empirical data we have gotten access to in the answers from multiple sources

within the Company, together with the written material with responses from the internal *feasibility study*, what the Company's project manager has called a *pre-study* (see appendix A), to get a full picture of the ongoing strategic decision-making process and its potential consequences.

We have created a database, backed-up online with a service provider, that includes all our empirical data and theory that was available electronically during our research. We have also kept all old versions of our thesis for reference. We constantly questioned the validity of all that we did in as to how it related to proving or disproving our hypothesis. This way we can maintain a chain of evidence in our work.

3.1.5 Validity, Quality & Ethics

The quality of a case study lies to a great extent in the validity and reliability of the study (Yin, 2008). The validation of an investigation is a very important matter if the audience is going to trust the results. Conclusions in a believable result are going to be easily traced back to the original sources of the information (Norris, 1997).

Since we decided to do a case-study with open-ended questions we had to assure ourselves that our findings were valid. This was done by working hard to maintain the chain of evidence and by constantly referring back to our hypothesis. We were striving for the use of well cited publications and recognised authors within the relevant areas.

To assure good validity for our interviews we interviewed two to three respondents each time, the material was collected, saved, backed up and later put in relationship to each other. Our three interviewees were positioned in different countries and on different levels of the organization, which helped us to get a broader view of the topic and thereby a fuller picture of the process within the organization. This gave us an opportunity to get a picture of how the impact of the information flow in the strategic decision-making process was affected by the individual's position in the organization and how national differences could affect this.

Reliability is about making sure that enough information is provided for the reader of the research to follow the process step by step and for other researchers to be able to replicate the study later on (Yin, 2008). The idea is that if the same study would be done all over again regardless of researcher the results would be the same. This is very difficult to achieve as the conditions in the surrounding environment like persons and viewpoints usually change over time (Seale, 1999). We put a lot of effort in trying to explain the reasoning behind our different decisions throughout the process, for example regarding choice of theoretical background, methods and conclusions to get a clear chain of reasoning. Our goal was to make the process as visible as possible for the future reader.

When conducting an investigation like this one there are a lot of ethical aspects to take into consideration. Most of these are closely connected to the interviews but also to the study as a whole. One of the major reasons for the extensive amount of ethical problems is due to the complexity of our lives and can take many different forms.

Kvale & Brinkmann (2009) mentions four different aspects that are important to consider when conducting interviews: *informed consent*, *confidentiality*, *consequences* and *the researcher's role*. We considered these aspects during all of our interviews and we started every interview by going through why we were there and what our interest in the interviewees' situation was. Any strict confidentiality of their names did not seem necessary for them as individuals but it was decided on the Company's request that we code all the empirical data, as much as possible, to avoid giving away competitive information. We considered the consequences for removing names of people and places but concluded that our topic wouldn't suffer from this treatment.

Our role was all the time to be a good listener, but to still be interactive. We choose open-ended questions that gave rise to a discussion more than a straight forward question-and-answers type of interview would. This gave us the opportunity to get to know the interviewees and their thoughts regarding the decision on a personal level, based on their role in both the organization and the project.

For us, as researchers, the responsibility of having a sense for ethical thinking was critical to provide a comfortable situation for the interviewees where they could speak freely.

3.2 Phase 2 – Empirical data

Our research came into the project at a very early stage in order to be able to pin-point the managements approach to the strategic decision-making process. We entered the company's process during their internal "*feasibility study*" and followed the on-going process over a five week time period. We asked and were given permission to interview a small number of key people in the Company's management who were active participants in this process. We did these interviews in "batches" and at different times.

Our first step was a meeting with a member of the company's executive management to get their view on the on-going internal *feasibility study* that they were performing, prior to making a "Go/No-Go"-decision regarding the implementation of a new CRM-system. We then had the opportunity to present the plan for our research (see chapter 2.6) and how it fit into their ongoing project. Once we had received their approval to move forward with them we asked to have all their current material from their internal process so far, regarding the on-going *feasibility study*. This was immediately handed over to us.

3.2.1 Questions

Kvale & Brinkman (2009) writes that the "...*qualitative research interview attempts to understand the world from the subjects' points of view...*" It is important to note the distinctions that they make between the dual aspects of the interview – the personal interrelation and the interview knowledge. The first focuses on the personal interaction in of itself while the second aspect focuses on the knowledge constructed through the interaction. They also state that a qualitative research interview tries to cover two different levels or aspects, a factual (what is said) and a meaning (between the lines) aspect. (Kvale &

Brinkman, 2009)

We tried to establish a good personal interaction with the interviewees by stating who we were and clearly defining why we meet with them, what we expected to get done and how we would go about it. Our goal with this was to get them comfortable with our presence and mission and thereby more willing to respond openly to our questions.

It was of importance for us in our work with this research to consider the duality of the interview itself carefully, both when asking the original questions and the follow-up questions, as well as when transcribing the collected material from the interviews. We had internal discussions immediately after each interview comparing what was said and how it was said to get a feel for the “factual” as well as the “meaning” aspect of the responses. This way we tried to ensure that we would accurately capture the essence of the information given us. It was of key importance that we strive to stay as unbiased and focused on the purpose of our research as possible during the whole process and stay with the interviewees perspective in dealing with the answers to our questions.

Based on a view of the current situation regarding why IS implementations fail or succeed we will see how this applies to the area of the strategic decision-making in a specific case. We will therefore be very careful in how we phrase the questions we use in order to try and avoid the questions controlling the interviewees’ responses. Our role as researchers is to prepare and ask *relevant questions, stay neutral and report all findings relating to the matter being researched.*

Once more we had to question the relevance of each question we created to prove or disprove our hypothesis. We also had to look at if any personal bias, based on previous experiences, was affecting how we formulate the questions. We also tested the five basic questions on each other to see that we avoided questions that could be said to be leading the interviewee along. By using a recording device we could also be sure to capture all that was said during the interviews.

A risk with empirical studies is that the outcome and results are created by the researcher, i.e. the format and structure of the research creates the outcome (Jacobsen, 2002). Through our case-study with semi-structured interviews we are trying to develop an understanding of a specific phenomenon. The formulation of the questions will have a strong influence on the outcome of the research (Sörqvist, 2000).

Based on our understanding of the issue, gathered from previous research in the area we were studying, we created a small number of open-ended questions regarding how the decision-making process affect the process of implementing a new information system. The questions would be “open-ended” since this would give the interviewee the opportunity to express their own thoughts and ideas regarding the phenomena being studied.

We had formulated our questions to ensure both reliability and validity in our research, as described earlier, by tying them to our key areas of interest for our research and the underlying theories and layers of previous research in the area (Troost, 2007). The importance of this is the possibility to repeat the same research either in the same organization or in

another organizational setting in order to arrive at a comparable outcome using the same methods and models. We kept all our questions connected to our basic hypothesis, based on our key questions of “*Why?*”, “*What?*” and “*How?*” in such a way that internal validity could be maintained, by giving us answers related to our hypothesis;

H₀ = "Executive management makes concessions in functionality in order to achieve a "Go"-decision, potentially leading to project failure."

The order of the questions is also important (Sörqvist, 2000) as they have to link into each other in a logical manner and follow a logical order for the interviewee. This we did by setting the questions in relationship to how we see the three original questions following upon each other through our case research model (see figure 2.1) in a logical sequence. We needed to tie our hypothesis and its possible effects on the organization into the questions and then put the questions in relationship to the organizations CBA approach. Since we were looking to achieve answers in several areas we created a cross-table to see that we covered all the aspects we had found to be relevant to our research from our understanding of the context based on available theory;

Table 3-1 Questions for the Interview guide based on our research

Area/Question	WHY? Need for decision	WHY? & WHAT? Problem & Solution	WHAT? Evaluation of solution		WHAT? (& HOW?) Consequence
	Why is this system needed?	Which are the 3 key functions needed in the new system?	Which of these key functions would you remove to achieve a "GO"-decision for the project?	What would be the effect of removing this key function?	Would you actively work towards implementing this removed key function later in the project?
Profit/Gain CBA (Hard)	X	(X)			
Understanding and acceptance in the organization (Soft)	(X)	X			
"GO" concession			X	(X)	
Concession effect			(X)	X	(X)
Corrective action (consequence)					X

In order to test our questions we used Sörqvist's (2000) 2-step model. First we did an internal test on ourselves to see if the questions would make sense to an interviewee. We then took the second, external, step and ran the questions past a number of personal friends and colleagues with managerial experience to make sure that they seemed relevant and were presented in a logical order. Their feedback was then implemented. We intentionally stayed away from the

technical aspect of things as we were focusing on the social aspect of the decision-making process. This testing gave us an indication that the questions were relevant and could be understood by people in equivalent organizational positions as our interviewees.

3.2.2 Interviews

An interview can be done in several ways, but we choose to use a “semi-structured” interview, since it seems best fitted for our purpose with the research; Kvale & Brinkmann (2009) tells us that semi-structured interviews are especially good for creating an understanding around a specific topic that is a part of the interviewee’s life. It can provide details not acquired by stricter interview styles while at the same time maintain focus.

Despite the time-limits imposed on us for our research, we think that interviews were the only way for us to obtain relevant data and information in order to test our hypothesis. Our decision to do interviews was based on what we felt was our need to get “inside” the organization being studied to be able to understand the process our research focused on. Jacobsen (2002) writes that interviews are the preferred method when a researcher is interested in the opinion of the individual within a certain area and to find out how he/she perceives a specific phenomenon. With interviews one is only able to reach relatively small numbers and it is time-consuming. (Jacobsen, 2002)

Our goal was to be able to follow the feasibility process for a stretch of time between early November and middle of December 2010. This way we intended to get a better insight into the main factors involved and how they may influence and even change how the project develops, with a focus on the impact of the decision-making process.

We targeted roughly two to three weeks between each interview. The interviews consisted of *five open-ended* questions and these were planned to be the same for each occasion in order for the responses to be comparable. Updates that might have occurred based on the responses we received in previous interviews are noted in the material (see appendix B).

There were two interviews, the first one in late November 2010. The first interview was a face-to-face meeting held on the Company’s premises. This was very important as it established basic trust and gave the interviewee’s a sense of security. The second round of interviews was held via remote video link and done in mid December 2010. Once again we used the Company’s own internal equipment to enable the interviewee’s to feel comfortable in their own office environment.

Our decision of multiple interviews over time was based on what we saw as the importance of being able to put the collected empirical data into its correct relationship with the executive management’s process of questions and feedback. Thereby giving us the possibility to see how, and what, information flows through the organization during the strategic decision-making process affects the understanding and acceptance of the proposed project.

3.2.3 Selection of interviewees

From our theoretical perspective for this research we understand that the decision-making is an iterative process and that the cooperation often is more vertical through the organization than horizontal. We have therefore intentionally strived to get interviewees from different layers of the organization to get an indication of how this affects the decision-making process.

We asked the Company for access to three key people, all with a positive attitude towards and actively involved with the *feasibility study* for our interviews. This was approved and we were given the relevant contact information. We would have preferred that they all were interviewed the same day each time, but due to geographical and work issues this was not achieved. The interviews in each round were however held as close to each other as possible under the circumstances.

The informants that we were targeting had to be involved actively in the process. From an ethical point of view we had to negotiate carefully with the Company selected to make sure they were comfortable with both our goals and methods for this investigation without us losing sight of the academic approach we wanted to maintain, as well as trusting us with relevant contacts and information regarding their decision process.

In cooperation with a member of the corporate executive management of the company where the data collection was to be performed, i.e. the project manager, three key individuals were identified to be interviewed over time. The criterion for an interviewee was that he/she was actively involved in providing data and information that would influence the decision-making process of the project.

Person W is a member of the executive management of the Company.

Person X works as a manager within a country organization that has a customized ERP system implemented today but lack a CRM. This person interacts with both the local top management and customers.

Person Y works as a manager within a country organization that uses an unspecified “management system”. This person interacts with both the local top management and customers.

Person Z works closely with the executive management of the Company in a country that runs several old customized systems.

A potential bias in this is that the people having a high impact due to involvement can be very pro-oriented towards the project. This is intentional as we are looking to see how they deal with the possibility of having to concede what they see as key functionality in order to get a “Go”-decision on the project after the *feasibility study* is finalized.

3.2.4 Transcripts

Once an interview was finished the transcription was done as soon as possible. This was to make sure that we could be helped by our fresh memory of the interview, in case there were any parts on the recording(s) that were difficult to hear or any other issue with the collected data. While transcribing we kept in mind our original questions and coded the transcriptions by the different themes of our questions to make it easier to find our way through them later (Kvale & Brinkmann, 2009).

We decided not to send the transcriptions to the interviewee's for correction. This decision was based on our concern that it would lead to retroactive changes that could damage our longitudinal approach. The coding themes used during this process were;

Table 3-2 Coding Areas

Code	Area	Explanation
P/G	Profit / Gain	What the organization could gain from implementing the new system.
AiO	Acceptance and understanding within the organization	How the individuals understands the new systems relationship to the organization.
GC	"Go" concession	Aspects related to the go-concession of implementing the new system.
CE	Concession Effect	The effects of making concessions to go through with the implementation.
CA	Corrective action	What would be done to counteract the concession effect.
LS	Legacy System	Systems that are running today.

These coding themes were all derived from the themes of our questions. The exception was "Legacy system" that proved to be an important part to separate from the others as it was not directly connected to the discussion about the new system but played an important role in the discussion around the needs of the organization.

With the thematized transcriptions we were able to gather the information of interest for answering our main questions and deriving information quicker and easier. The names of the Company at hand and the interviewees were also coded to assure confidentiality, not so much for the interviewees as individuals but for the company as a whole. The company was therefore referred to as "the Company" while our different interviewees were given the names W, X, Y, Z and where W is the one leading the project. As the interviewees were from different countries these were also coded, as "Country 1", "Country 2" and "Country 3". The request for anonymity also led us to code their current software solution as "Customics".

We developed our own index system to make it easier both for ourselves and the reader to find particular points of interest in the empirical material connected to our analysis. The coding consists of one letter and two numbers;

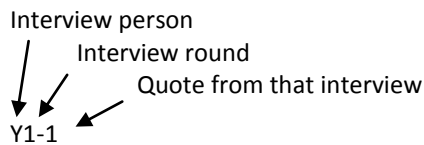


Figure 3.2 Index coding of interviews

The letter corresponds to the person interviewed and the number following the letter tells us if the quote belongs to the first or second interview round. The last number points towards the paragraph of the interview at hand.

Table 3-3 Example from interview one with person Y, showing quotes five and six

Index	Theme	Transcript
Y1-5	P/G	Y- It's needed, first of all, we want to, we have the ambition to be a very important player in the light branch, so we become a multinational instead of only Swedish company, and by realising that I think this system, a general system, which can be used, which has to be used by every separate country should be one and the same. To speak the same language, to have the same issues. And that is why it's very important.
Y1-6	AiO	Y- On the other hand I think that we have to have a state of the art software. Business is changing, changing rapidly and current systems are too old fashioned. They have their limitations and that's why we have to implement a new system.

3.2.5 Analysis

The analysis process was conducted in several steps. Each interview was first analysed individually and filtered for information critical for our investigation. It was then compared against the other interviews from the same round and later, also against the second round of interviews. This was then later set in relationship with the relevant background material provided by the Company from the time before our involvement in the process. This way we were given a longitudinal view of the whole feasibility process.

- **Background material**

At our first meeting with the project manager, and overall responsible person for the IS project, we received a large amount of material, including questionnaires and responses from the management regarding their internal *feasibility study* so far. We decided to *not* look at this material before we had held our interviews so that the feedback included in those responses would *not* create a *bias* in our questions during the interviews based on detailed inside knowledge. We did however have an overall view of the content from the project manager after the first meeting.

The written material provided from the Company's internal investigation (*pre-study*) at the beginning of our research included our interviewees and their responses to it. We originally

intended to use it for comparison with the answers to our interview questions, but upon further study we concluded that it was not doable due to the questions there being around features and requirements set by a pre-selected CRM system. This is more related to the “*What?*” and “*How?*” of our case research model (see figure 2.1) and falls outside the strategic scope of this thesis.

We could however use this material in our analysis to extend our view of the project to cover everything that had been done from day one, including information delivered to the executive management (see appendix A).

- **Interview material**

The recorded material gathered from the interviews was stored electronically and then transcribed. After it had been coded we went through the interview material several times to make sure that we could extract the relevant information that could either prove or disprove our hypothesis.

Since we did not have any video footage we also went back to the interview recordings and compared our interpretations of tone of voice, breaks etc. so that we could achieve a consensus around our understanding of the answers given to our questions during the interview.

3.3 Phase 3 - Results

3.3.1 Discussion

Once we had collected and analyzed all the material we started to discuss the implications of our findings. The focus was on how the relevant responses applied to our hypothesis and what we could extract regarding the strategic decision-making process from our empirical data.

3.3.2 Conclusions

Our discussions led us to a number of conclusions about our empirical findings and how they applied not only to prove or disprove our hypothesis, but also to what degree they could be generalized. Based on our empirical findings and their relationship to our hypothesis we looked for areas where we perceived a lack of know-how within an organizations management on how to best approach a strategic IS decision-making process.

3.4 Criticism

To even further increase the quality of a study one has to question the result and try to find contradicting evidence. With this attitude in mind the researcher is more likely to be certain that his findings really are correct and it shows an attitude towards his research that makes the findings more reliable and trustworthy. The findings during this process can also contribute to new aspects of the field of interest and to a greater understanding and thereby also better conclusions. Member validation, triangulation and analytic induction are examples of ways to find contradicting data even though they also can be used to strengthen the current findings. (Seale, 1999)

In our work we see that since there is only one case company. The risk with this may be that any conclusions drawn may be specific to this operation. Despite this, based on our own previous experience with similar projects, we hope to be able to give a balanced view of our findings.

Our interviewee base is relatively small; this may limit the variation in the material we collect. We try to counter this effect by having people both from the same position, but different countries, as well as people from different management levels in the Company answering our questions. Our aim with this is to achieve the broadest possible variation of viewpoints within the organization.

We have not been able to find a lot of previous comparative research that proves or disproves our hypothesis in advance, unless it has been done “post-mortem”, i.e. research performed after the success or failure of a strategic IS-implementation. The materials we have found either covers the IT/IS-implementation process after the “Go/No-Go”-decision is made or it has the business approach and is focused more towards the general issues of strategic business planning.

This may be because of the rareness of the opportunity presented to us to follow a decision-making process at a strategic level while it was unfolding. This lack of evidence for the issues we originally perceived with the strategic decision-making process may cause us to draw erroneous conclusions regarding the generalization of our empirical findings.

4 Empirical Analysis

Our first impression when we were introduced to this project by the Company was that a system had already been selected at the executive management level and that the company was going through what they called a *pre-study* in order to try to get a better understanding of “*What?*” was needed or expected from the project by the local management around the world through the process of gathering feedback.

When we were shown the original time table (see appendix C) our first impression was reinforced. It looked to us like, based on our understanding of the strategic decision-making process involved for an IS project of this size, a very tight timeline for collecting enough relevant data to be able to make the final “*Go/No-Go*”-decision.

4.1 Internal survey - feasibility study

The *feasibility study* we were following in our research was very much a work towards making a policy decision regarding a major IS-project by the executive management of the organization. It precedes the implementation of said policy.

Our own experience together with feedback from the responsible individuals for the IS project we had chosen for our case-study clearly showed us that the executive management expected to take in consideration feedback on the needed functionality of the new system. But the corporate decision-making body would to a large extent base its “*Go/No-Go*”-decision regarding the IS investment on a CBA, in order to maximize their ROI.

Our first step of analysis was to go through the written material delivered to us from the executive management’s, internally performed, three rounds of written queries; the responses from two of these internal rounds in the form they were passed on to the executive management are included in this document (see appendix A).

The third internal round was a series of questions based on a slide presentation of a pre-selected CRM-system with only three country teams responding with references to the 16 points presented in the slideshow. Since there were few responses, and the quality of these were low, we have decided to not include it in this thesis as it falls outside the scope and adds no additional information except to perhaps highlight the already visible issue with using a pre-selected IS at this early stage of the strategic decision-making process.

These three questionnaires went out to 13 people in the first and second round, but only to eight in the third round based on the responses received in the previous rounds. There were ten responses in the first round and eight in the second, from the third round only three answers were received. Ten of the surveyed individuals were country managers or their representatives; three were from people inside the executive management. Our interviewees were two from the country management teams who had responded to all three surveys, and

one person working closely with the executive management, but not part of it.

Based on our theoretical understanding of the strategic decision-making process we found the absence of, or issues with, some key points in the internal *feasibility survey* performed by the Company;

- Question or analysis of needs of the organization
- Questions about or definition of current processes-i.e. sales, marketing and CRM
- Queries regarding any legacy systems and their functionality
- A “Pre-selected” system presented
- Pre-set answers to many of the queries in the first round

These points to a gap between the executive managements’ understanding of the CRM-system as a support tool for the Company’s current business processes and the view of it as a standalone solution for perceived issues with the lack of a coherent information system for the entire organization. This also explains some of our issues in gathering concrete responses to our own questions regarding the “Why?” a new system was needed and what functionality it should include.

We then continued by looking at the gathered responses from the first survey of the Company’s internal *pre-study* (see appendix A). Question 1 was regarding what the respondents thought were the key “functions” of the proposed new CRM-system based on pre-set alternatives;

- i. *CRM should provide accurate information on future business potential*
- ii. *CRM should be a way of minimizing the time spent searching for information*
- iii. *CRM should be a tool to help make strategic decisions*
- iv. *CRM should be a tool to improve customer satisfaction*
- v. *CRM should provide a management tool to measure sales efficiency*
- vi. *CRM should provide information to enable more effective marketing campaigns*
- vii. *CRM should be a way to link the business units across the Company group*

There is no reference to where these alternatives come from or what their implied importance for the strategic “Go/No-Go”-decision is based on.

Though here was the option of adding you own response only one such was added to question 1, “...to provide more sales.” (see appendix A).

What we found interesting is that we could not find a logical connection between these questions and the later on provided presentation of the pre-selected system.

Question 4, “*What are the key ways in which you see CRM adding value to our business?*” shows us that the CRM-system is seen more as a value added item than business process support by the executive management. The responses received though points towards a more process oriented view from the local management in the field (see appendix A), this in turn puts more focus on functionality.

The local management looks at the CRM-system as a way to collect, update and share customer data and information from a centralized system. They see the possibility to be able

to track ongoing business cases and projects, evaluate customers and develop a closer relationship with their customers by providing better service and focused marketing activities. One survey response looks at the organizational impact of a unified CRM-system, *“Forming field sales and office sales to one efficient team with a common set of up-to-date info. = Better quality in the sales process and time efficiency.”* (Appendix A– Responses to Company’s internal feasibility study).

Among the responses to Question 5, *“Please state any other issues which you feel are important to consider as deliverables at this stage.”* we found another interesting answer that falls outside the actual question asked; *“Every country has a special business so a special way of working, it might be difficult to find a common CRM setup for everyone”*. (Appendix A– Responses to Company’s internal feasibility study)

The question of needs for localization is important as it points to differences in the local processes involved in doing business. Awareness of these differences is important for decision makers to be aware of for a strategic decision as it shows the potential for resistance to or issues with implementing the IS-solution if there is a “Go”-decision. We could not find further reference to this key issue later on in the materials.

The next questionnaire was number three, as it was decided that the original number two’s questions were already covered to a large extent by the responses to survey number one. Here the questions are already going into specific about organizational skills and possible changes and their effects; issues more related to a decided implementation. At this stage it seems to us to be a *“rush”* to get to a decision.

4.2 Interviews

Our next step is to go through our transcripts and look at the answers and what they tell us about the ongoing project in relationship to the focus of our research.

4.2.1 Round 1

Table 4-1 Q1-“Why is this system needed?”

Interviewee	X	Y	Z (authors translations)
	<i>I mean we can make quotations, sales order and everything... but we are missing the part which is before and all the sales representatives have a lot of information and they have nowhere to put them. (X1-6)</i>	<i>...so we become a multinational instead of only Swedish company, and by realising that I think this system, a general system, which can be used, which has to be used by every separate country should be one and the same. To speak the same language, to have the same issues. And that is why it's very important. (Y1-5)</i>	<i>I believe that efficiency is... That I think is very high up. Efficiency to, so that we can be efficient and do more and most of all get more orders, more work contracts. (Z1-1)</i>
	<i>All this thing we are quite missing, all this information for the moment, so we would like to have a...somewhere to collect the data. And share information, and then to adjust our solution, our offers and everything. (X1-6)</i>	<i>One solution, one company! Lots of time savings... knowing exactly what happens... in projects, with our customers, and there should of course be a kind of workflow management situation... so letting each other know what the status of some projects is, order status and contracts... internally, externally... (Y1-58)</i>	<i>Access to information and that you build up information and pass it on to others who also work in the same customer, same project, same situation...and as support in processes, that one can get common access to information. (Z1-2)</i>
			<i>...and internationally there are more and more companies and there is a demand for this type of system and in some cases we have international business cases that cross over several countries and there it would make it easier. (Z1-49)</i>
			<i>Yes...it is hard to say, I see it as very many are calling for a CRM without actually understanding what it means. It is just a functionality one can do something with, but few understand the amount of work it entails, especially initially to work in a new way. (Z1-57)</i>

These answers point to very different views of the reasons “Why?” this project is necessary. On one hand we have the operational approach of X stating the need for “...quotations, sales

order and everything, but missing the part before that...”

At the other end we have the more strategic view of Z, naming “...*efficiency...*”, “...*support in the processes...*” and the internationalization.

Y’s answers being the middle ground, focusing on items like “...*multinational...should be one and the same...*”, “*Lots of time savings... knowing exactly what happens ...*”

The common ground for all these answers goes back to the value of sharing of information to make things easier and smoother. Z actually points out the lack of understanding within the organization, “...*very many are calling for a CRM without actually understanding what it means.*”

Table 4-2 Q2-“Which are the 3 key functions needed in the new system?”

Interviewee	X	Y	Z (authors translations)
	<i>...share information, and then to adjust our solution, our offers and everything. (X1-6)</i>	<i>Three pillars... Of course marketing, it should be marketing driven... Relations, so we have to store everything about our customers. And by mentioning marketing you should think about marketing intelligence. And the third pillar should be projects. Our business is done by projects, so we have to follow projects, we have to... and there are several roles of course in projects... so it should also be project driven. (Y1-15)</i>	<i>But then we have two so far... one was this field sales, in-house sales, customer, to achieve a good information sharing and cooperation there...that is one... Then we have this when pan-European or many...you used the word frame-agreement with many local actors, is impossible to get a grip on if you do not have a tool. (Z1-20)</i>
	<i>I don't see anything now... (X1-13)</i>		
	<i>Well, marketing is more connected with the sales representative at the moment, but that would be great if we have more information from them. We would know what would be the new product and everything, our market better. Because now we are only working day-by-day I mean in our department and would like to have another vision of the market. So that would be interesting... (X1-19)</i>		<i>Yes it is but it feels as if they use it a little like...they have their stakeholders but...it becomes an offer...there might be not only one but one, two...it becomes many, there is computer calculations for the light...it becomes many files, drawings etc... [...]...and often one uses a document handling system. Get in [...] look up the project and be able to find all available data, which then generates efficiency. (Z1-23)</i>

Here X emphasises the need for information sharing, “...to adjust our solution, our offers and everything”, but still struggles with defining three key functions of the proposed CRM.

Y presents a clearer view, “...marketing...”, “...relations...” and “...projects...” A key reason for this may very well be that in Y’s country organization they have already implemented their own local CRM solution. Y’s answers could well be defined by the functions they have already implemented.

Z mentions “...information sharing and cooperation...” and having “...many local actors...” involved in a project with need to access “...all available data, which then generates efficiency...” Even though Z separates different aspects of the proposed system the responses focuses on the efficiency gained of sharing of data and information.

There was a common thread of uncertainty when the answers were given as to what exactly would be the key functionalities of the proposed CRM.

Table 4-3 Q3-“Which of these key functions would you remove to achieve a "GO"-decision for the project?”

Interviewee	X	Y	Z (authors translations)
	<i>Well I think synchronization is real big one, so I want this. Quite hard to say...(X1-51)</i>	<i>None. It would stop for me. It's not... There's no question about skipping one. (Y1-21, 22, 23)</i>	<i>Many times it can be wise to start small and build up. There are a lot of people who shall be involved and learn...and it is new and it is complex. (Z1-25)</i>
	<i>Yeah... I don't remember...but I guess that if...I don't know...(X1-52)</i>	<i>It will be... it will affect our business too much in [Country 2]. (Y1-27)</i>	<i>Yes, but it can also be so that one adds things in step two or three, just as long as one knows it can be done later...so one does not exclude that functionality if there is a lack of time or money, whatever it is that makes us want to wait... (Z1-26)</i>
	<i>Yeah, yeah, sure, sure... maybe we could arrange something else...with the searching...anyway we will have to adapt ourselves...probably as we have all the information that would be the best and then we'd try to find another solution to...search information. Probably this would be the one we could live without... (X1-57)</i>		

X gives us an answer that builds on the answer to the previous question and points to an uncertainty of which functionality is key and why. “...synchronization is real big one...” but “...search information. Probably this could be the one we could live without...” coordinating the information is important, but the search engine they could look for elsewhere.

Y clearly states that this is not an option. If the three defined functionalities are not delivered they will stop the project on their part. “There’s no question about skipping one.” and “...it will affect our business too much.” the effects on their ongoing daily business would be badly impacted by the removal of any of the key functions.

Z takes a different approach by stating that they should start small and slowly develop the system over time due to complexity of the project and the amount of people involved. There is no removal long-term, even if a removal would happen in the early phase of the project it should be put into the plan for a later phase, “...do things in step two or three...” and “...so one does not exclude functionality...depending on why we would want to wait...”

We see a difference in the understanding of the key functionality and its effects on the business.

Table 4-4 Q4-“What would be the effect of removing this key function?”

Interviewee	X	Y	Z (authors translations)
	<i>I think we will try to find a solution later on. We have already done that for the actual system. We are missing information and missing functionality so...we found our way of working. So I think we would do that. (X1-59)</i>	<i>It will be... it will affect our business too much in [Country 2]. (Y1-27)</i>	<i>The roll-out goes step-by-step, yes. (Z1-31)</i>

X and Z both see the removal of any key functionality as a temporary set-back. X states that “...we will try to find a solution later.” and Z said that “The roll-out goes step-by-step...”

The main difference is that Z clearly sees the possibility of the executive management doing cuts in functionality in order to get a “Go”-decision, but that it will be in the plans for implementation further down the line. X on the other hand has a vaguer picture of what constitutes the key functionality and therefore is more prone to look for a work-around for any missing items.

Y already in the previous answer stated that it would affect their business, in what way was not clearly defined, but Y’s previous responses indicate that communication and information sharing were key factors that needed improvement. This is supported by Z’s answers.

All the answers point to the fact that removal of key functionality would affect business.

Table 4-5 Q5-“Would you actively work towards implementing this removed key function later in the project?”

Interviewee	X	Y	Z (authors translations)
		<i>Always. Always. Because I think those three pillars are main and they are key for CRM, good CRM. And that's the reason why I for [Country 2] would implement that... always... whether the group says no or yes. (Y1-65)</i>	

These responses tied closely into the answers of the previous questions, Y was the only one who clearly stated that “...*Always. Because I think those three pillars are main and they are key for CRM, good CRM...*”

X already in the previous answer made it clear, that they would find a solution themselves, if it was not provided by the proposed IS system. In the case of Z it was clear that any concession would have to be in the initial plans for later implementation in order for the plans to progress. Y would not accept any concessions on the key functions and would always try hard to find a way to make sure they were included.

All the interviewee's agreed that they would find ways to circumvent any concessions on functionality by the executive management in order to achieve a “Go”-decision.

4.2.2 Round 2

All the questions and quotes above are from the first round of interviews using the original questions. In the second round we were forced to focus entirely on follow-up questions. The reason for this was that the interviewees received no further data, information or other feedback on the project in the weeks between the first and second round of interviews.

In the second round we therefore focused on follow-up questions relating to their place in the organization and their potential impact on the final decision. Unfortunately in the second round we did not have enough time available to get interviewee Z's response due to Z's travels and work with closing the books for 2010, therefore we only present what came out of the interviews held with X and Y.

Table 4-6 Responses to questions from the second round of interviews

Question/Interviewee	X	Y
Have a Go/No-go decision been taken?	No. (X2-5)	Nothing! So tell me... what is happening over there? (Y2-5) Is there a go? (Y2-10)
New project info?	No. (X2-6)	Nothing! (Y2-4)
Who decides which functionality should be included in the new CRM system?	Yeah... I think Ws is everything and then he will ask if it is ok and... say these are the functions we require. (X2-9) So.. I am not the decision person... (X2-10)	I do... I do, together with... I have a small project team over here in [Country 2]... Myself, two sales persons and one person from the marketing department... And three of us will decide what will be in the system or what's not. (Y2-16)
Who will be the key users of the new system?	Well, I guess everyone will use it. I mean it has information regarding prospects and customer and everything. Everyone at this point will have to take the information so I guess everyone will use it, but the key users might be either the sales representatives, as they are at the beginning of everything or their personal assistant. (X2-12)	Everyone will use the system. Everyone, everybody... Key user will be me, and the marketing members. (Y2-20)
Who do/have you cooperate(d) with in this project?	[...] we are three: [Financial manager's name] and my boss and me. (X2-18)	[...] I have a small project team over here in [Country 2]... Myself, two sales persons and one person from the marketing department... [...] (Y2-16)
What is their role in the organization?	[Financial manager's name]. She's the financial manager... Because she was at the beginning of the project as well for Customics, when we implemented it, so... we are three: [Financial manager's name] and my boss and me. (X2-18)	See previous.
What is their role in the project?	(Boss) It's just... everything... so he has every commercial ... so that's why... well he's leading the commercial team so... that's why he wants to have a look on CRM and he wants to know how it will work. (X2-17)	Well... previously, some months ago, we sat together and we defined wishes and... how do you call them... (Y2-22) Functionalities, what must be in the system and we... put everything on paper. That's one and secondly... Everything I discuss with you, with W... I communicate with them, and I ask them what they think about it. And the three first questionnaires... the answers were defined not only by me but also by them. (Y2-23) We did it together. (Y2-24)

What is your boss thoughts/reaction to this project?	... Well what we thought was that, the quicker the better for us but... we are working with else by now. But we have come to a point where CRM is really, really important because we can't keep walking this way and just loosing information... But we are not so sure that the CRM that is in Customics will be the best one for us. (X2-20)	The same as I, I tell you. He... think that we have to operate, we have to work with one and the same system. Huge benefit, and also for [The Company] worldwide it's ok. If there is a no-go... I think we can live with it, and my boss thinks that too, but we have to argument... we have to discuss this with W. (Y2-17)
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The roles of the people answering here were the same within their country organizations; still we can see quite a difference in how the more informal project organizations were set-up;

"[...] we are three: [Financial manager's name] and my boss and me" (X2-18)

"[...] I have a small project team over here in [Country 2]... Myself, two sales persons and one person from the marketing department... [...]" (Y2-16)

In the case of X, the country manager was actively involved and made the decisions about what would be important, while in the case of Y this responsibility was delegated almost entirely to Y. The responses to the question about their respective bosses' thoughts, on the subject of the proposed IS, show the same difference;

"Well what we thought was that, the quicker the better for us but... we are working with else by now. But we have come to a point where CRM is really, really important because we can't keep walking this way and just loosing information... But we are not so sure that the CRM that is in Customics will be the best one for us". (X2-20)

"The same as I, I tell you. He... think that we have to operate, we have to work with one and the same system. Huge benefit, and also for [The Company] worldwide it's ok. If there is a no-go... I think we can live with it, and my boss thinks that too, but we have to argument... we have to discuss this with W." (Y2-17)

They both show doubts about the proposed system, but while X states that it may not be the best for them Y looks more towards the effects of a "NoGo"-decision.

This may be due to the most surprising finding of this round, the lack of any further feedback on their input from the last (3rd) round of questions from the internal *feasibility study* performed. There was no information, at the time of our second round of interviews, about if or what decision(s) had been taken in regards to the project either.

As we can see this already now has an impact on the local teams and their view of the whole project and it will likely affect the local decision-making regarding how they will implement a CRM, whether it is using their own or if and how to use the proposed global IS.

5 Findings and Discussion

The early information from our case Company pointed to the fact that the executive management saw the suggested CRM project as an IS-supported efficiency project.

In the context of this paper, an efficiency IS project is defined as one that seeks to reduce the cost of performing a particular process or task by utilizing information technology. It does not seek to radically change the nature of the objectives that those tasks and processes were devised to fulfil, it simply seeks to achieve the same objectives at lower cost, i.e. to perform existing tasks more efficiently. (Fitzgerald, 1998)

But in order to achieve efficiency there has to be an understanding why the current process of doing things is not efficient and how it could be improved. This is where the *feasibility study* comes into the picture. Using our definition of a *feasibility study*, as trying to answer the question: Is the idea workable and should one proceed with it? It will be hard to see if the idea is workable when the basic idea is not clearly defined... i.e. “*Why?*”

We know from our theory that the characteristics of strategic decision process are its novelty, complexity and open-endedness (Mintzberg et al., 1976). This is due to the fact that an organization when it comes to a strategic situation starts out with a limited understanding of the situation they are facing.

Based on the findings from our analysis of our empirical data we now proceed to discuss the outcome of our research in the area of strategic decision-making and its effects inside the organization. This is done in the order of the underlying questions created from our understanding of the theoretical groundwork.

Q1 - *The common ground for all these answers goes back to the value of sharing of information to make things easier and smoother*

From the responses to our initial question we can already see that there is no coherent view of the “*Why?*” of the new system. If we look at the material from the management team, that we have gotten access to, with the requests for feedback it lacks any information regarding *why* this system is even being considered, what the basis of this request is.

As Z points out, there is a lack of understanding within the organization, “...*very many are calling for a CRM without actually understanding what it means.*”

A common way to deal with creating the basis for this type of understanding is a so called SWOT (Strength-Weakness-Opportunity-Threat) analysis, but we have seen no such thing in this process. The presentation of a SWOT analysis, or at least its key components and outcome, could have given the participants in the *feasibility study* a clearer view and understanding of the need for a new CRM.

Q2 - *There was a common thread of uncertainty when the answers were given as to what exactly would be the key functionalities of the proposed CRM.*

Here we see more clearly the continuation and escalation of the issues with the progress of this decision-making process, based on the lack of a clearly defined “Why?” Since the answer to that question would have pointed to a problem that needed a solution and thereby given the participants a starting point for seeing which functionality would be needed in order to solve any weaknesses (internal) or counter any threats (external) found during the SWOT analysis.

Q3 - *We see a difference in the understanding of the key functionality and its effects on the business.*

The responses given show a wide spectrum of understanding and acceptance of the proposed system. Though they all give the impression of accepting the need of the proposed system, the understanding of “Why?” seems to be, based on our empirical data, very divergent.

The risk of this spectrum of answers is that it creates a very hard position for the executive management to correctly understand the feed-back they receive from their *feasibility study*. By getting a very wide spectrum of definitions of functionality based on the individual’s own interpretations, rather than a common understanding of the need for the proposed IS implementation, will dilute the value of the feed-back as part of a “Go/No-Go”-decision. What it should tell the executive management though is that there is a need for further study and more information to create a better understanding and acceptance of the “Why?” the new IS is needed.

Q4 - *All the answers point to the fact that removal of key functionality would affect business.*

There is an acceptance of the fact that a common CRM system is needed, though the interviewee’s do not necessarily agree on or understands exactly “Why?” this is, at least not from an overall organizational point of view.

Though not always clearly specified, the removal of any key functionality was seen as having a detrimental effect on the business. All the interviewee’s do think that a CRM is important and would be helpful in sharing information. But the scope of a CRM is not clear to any of them.

Z said that “*Then there was something...I reacted to [...] where [the CRM] fits the process forwards and backwards...And I think it went all the way from manufacturer to invoicing...*” (Z1-94, authors’ translation)

Here Z was referring to the information he had received regarding the proposed CRM systems scope as presented in the materials that were part of the internal *feasibility study*.

Z followed this later with “*...I was a bit surprised myself; oh, can it be a CRM-system that goes so far in both directions.*” (Z1-98, authors’ translation)

Both these statements when set in perspective to the different views of the functionality of the proposed IS, shows that the scope of the CRM is not clear to all involved.

Q5 - All the interviewee's agreed that they would find ways to circumvent any concessions on functionality by the executive management in order to achieve a "Go"-decision.

It is quite clear that all involved parties would find a way around any decision made by the executive management about removing what they felt was key functionality. The issue is that the managers we interviewed did not share the picture of what these key functionalities are, neither were the original documents (questionnaires) sent out for feed-back from the executive management clear about what functionality was looked for in the proposed IS.

5.1 Case-based description of process issues within the organization

We have, based on our empirical findings illustrated the issue with the undefined "Why?" of our case study and the lack of understanding and acceptance within the organization by creating a case-based model showing the organizational layers and how the information flow in combination with organizational factors like role and responsibility has impacted the feasibility study performed based on our findings from the empirical data collected.

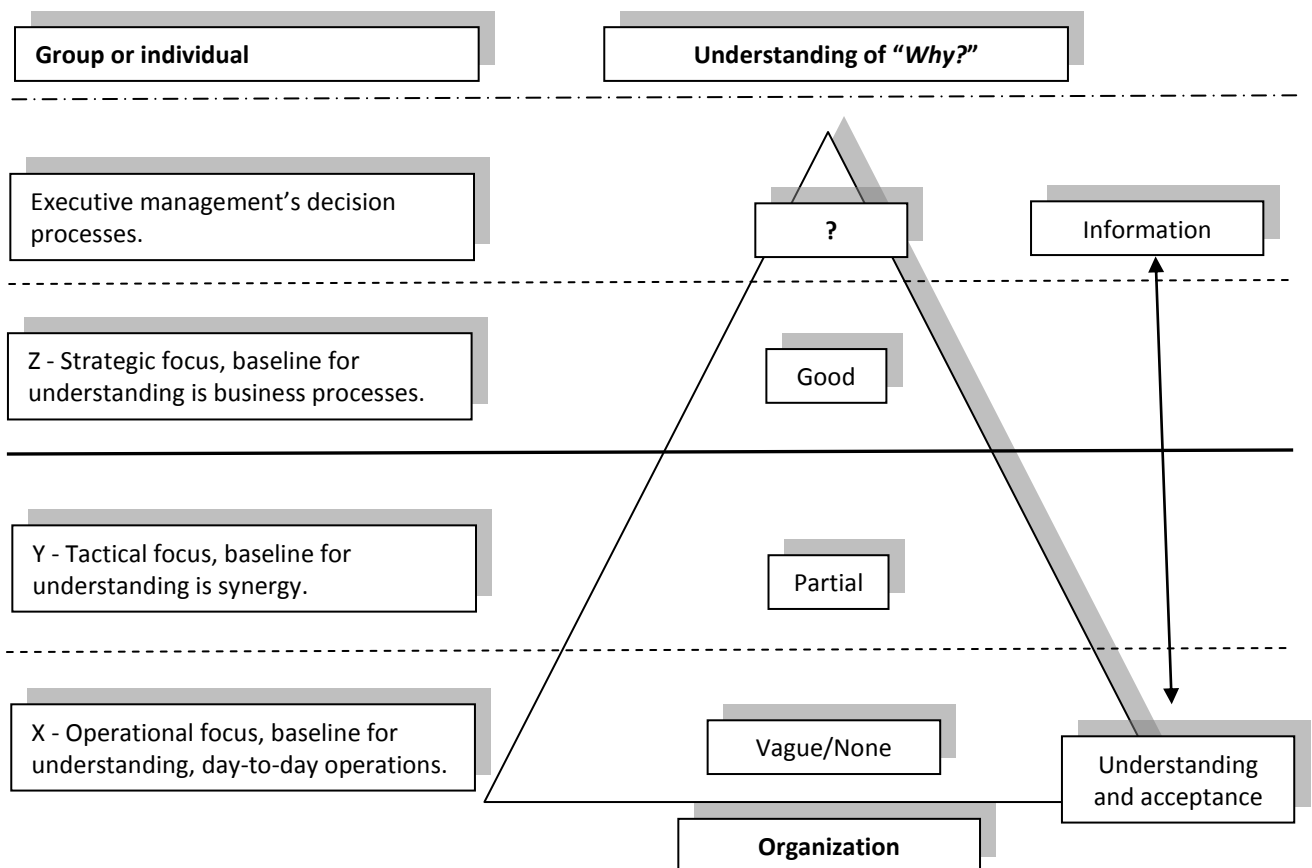


Figure 5.1 Organizational understanding of "Why?" an IS project is needed, based on our empirical data.

Our empirical data shows us that the unclear definition of “*Why?*” i.e. the problem description, resonates through the whole case-study. This affects the understanding and acceptance of the proposed IS project in all layers of the organization, which in turn leads to an non-aligned view inside the organization of “*What?*” is needed, i.e. functionality, to solve the perceived problem. The effect of this is that the “*How?*” i.e. the implementation of the decision to solve the perceived issue becomes almost impossible from the start.

Why is this? Based on our understanding of the theory behind strategic decision-making and our empirical material and findings we concluded that;

- Lack of clear explanation from executive management “*Why?*” the proposed system is needed.
 - Strategic goals not defined or provided.
 - Problem definition not defined or provided.
- Time-frame too short to establish internal support for implementation, i.e. New vs. Legacy system(s), benefits;
 - Functionality? Lack of analysis of legacy systems, needs of organization and functionality needed to support goals of organization.
- Vague understanding within local project teams of “*What?*” a CRM-system can provide to support business.
 - Interviews show diverging views of functionality, what is it, what can it do, what is the benefit?
- Lack of feedback causes uncertainty about the whole project inside the organization.
 - Interviews from round 2, responses from question of having received any new project information or feedback; “*No*” (X2-6) and “*Nothing!*” (Y2-4)
- Local differences are important and will impact outcome.
 - Organization
 - Business models

In a more in-depth analysis of this we see a series of possible causes for these issues and will discuss them further.

5.1.1 Executive managements awareness of implications of strategic IS decision

The executive management is the team who draws up the strategy of the organization; their role is to define the goals for the organization. In order to get a better picture of the organization they initiate a *feasibility study* to see if the implementation of a new global CRM system is feasible.

As we can see from our research this process has to begin with the question “*Why?*” and a clear definition of the issue or problem to solve. To understand the problem information is needed, therefore a *feasibility study* is a good tool. But as we have seen, if the initial problem is not clearly defined and broadcasted to the people inside the organization involved in the study the responses will show a strong divergence. We found two important points in our material where this is proven;

- Divergent understanding of “*Why?*” the new system should be implemented.
- Divergent views within the organization of what functionality should be included in the proposed CRM-system, as well as whom the key users will be.

The inclusion in the *feasibility study* material of a pre-selected CRM-system can act as a strong limitation factor, as it could give the interviewee’s a strong feeling of having a limited impact on the decision.

In our case study this showed in the fact that both X and Y had focused on responding to the questions posed in the internal questionnaires based on the pre-selected IS. Z on the other hand had not responded to the last round of questions, as he still had his own questions about “*Why?*” this IS was needed in the first place.

5.1.2 The project managers role in our case study

The first thing we got confirmed was that the project manager (PM) assigned to the task had a mandate from the executive management to perform a *feasibility study* for a global CRM-implementation within the organization. This was confirmed by the PM in our first meeting. Our understanding of the criteria for the choice of PM was that of experience with a successful implementation in one country of a local CRM-system. The PM had come into the Company as part of a recent mergers and acquisitions (M&A) stage that included the PM’s organization in country 4. The understanding was that this experience would be beneficiary in the *feasibility phase* of the global CRM-system. This may have a negative impact on the study performed and its outcome, as consideration for local differences in business processes might not be taken into consideration properly.

At the first meeting we carefully pointed out the issue with the time-constraint placed on the *feasibility study*. Based on our own practical experience the 3.5 month timeline (see appendix C) given to perform the *feasibility study* within the Company, being an international organization stretching around the world, is a short time even if doing it on a full-time basis. In this case the assigned PM had to do it on top of a normal full-time job. The feasibility of a good *feasibility study* within the timeframe given was not addressed and it created a “*rush*” to get it done on time for the executive management to make a “*Go/NoGo*”-decision before the end of the year. This “*rush*” could have a strong negative impact on the quality of the study as it does not allow a more in-depth data and information gathering process based on a relevant understanding of the problem that needs to be solved and the *functionality* needed to solve it.

5.1.3 Understanding and acceptance

One key issue that we have come across in this research is the lack of consistency in understanding of the exact reason for this implementation by the interviewees in the different areas. We could not get a consistent response to why this IS was needed and what functionality it should include. This points to an issue either in the definition of the problem to be solved by the proposed IS or a lack of communication of relevant information at all levels.

We understood based on our studied theory that the need for a strategic decision usually is prompted by a perceived need to solve a problem of some kind, i.e. the answer to the question “*Why is this decision needed?*” Our available data does not show this to have been defined clearly in this case. Based on the interviews we have had there are two main ways this may have occurred;

“...many are calling for a CRM without actually understanding what it means.” (Z1-57, authors translation)

Why do they call for this? If this was the starting point for the definition of a problem that needs a solution and therefore a decision, it has to be defined and communicated to all those involved in the *feasibility study*, in order to generate valuable feed-back that points to if the proposed IS actually fulfils the perceived need and supports the business model and its processes.

“...of course we should have a CRM! All modern businesses have a CRM...” (Z1-71, authors translation)

In our practical experience with a number of large ERP and smaller CRM implementations this is surprisingly often found to be the starting point for IS projects. Corporate management that we have spoken to, off-record unfortunately, admit that the idea of investing in a system often is driven by concerns about the competition gaining an edge by having a new IS in place, a competitive edge.

We lack information that gives us solid proof in either direction, but our empirical data in this case point towards the first answer. This conclusion is based on the general acceptance of the need for a CRM among our interviewees; though their reasons for *why* it's needed vary, they do agree that sharing of information within the organization is important and they feel the CRM will supply that functionality.

Either way the major reasoning behind it, as to what problem the IS solves, is not clearly defined or communicated inside the organization. Why is it so? Our empirical data shows the issue quite clearly;

“...what are the benefits of this?” (Z1-71, authors' translation)

“...what is the up-side of this?” (Z1-71, authors' translation)

“...what shall we use it for?” (Z1-71, authors' translation)

These three questions came out of the same sentence and it shows the issue with the communication dealing with the *feasibility study* performed. Even after answering the questions of the first two questionnaires the interviewee still wonders about this. The implications for a future implementation can be seen as grave, without this understanding there will be both internal resistance and issues about expected functionality, causing delays and additional costs or in worst case a cancellation of the whole project.

5.1.4 Impact of national differences

As we have already pointed out, in our analysis of the empirical data, there is a strong difference between different country organizations and how they have approached the *feasibility study*. In the condensed version of the responses from the study sent forward to the executive management in order to make their “Go/NoGo”-decision there is no information regarding where the responses originated, i.e. which country they come from and any potential impact of this on an implementation of the proposed IS at a later stage.

The consequences of this can be more devastating than most others since the responses are given with the participation or at least the consent of the local executive manager in each country. There are some important variations in how local countries business is done that will have a heavy impact on the “What?” and “How?” of the proposed IS;

- Local country project teams differ in roles & responsibilities and management;
 - Country 1 – Strong top management control.
 - Country 2 – Delegation of responsibilities.
- National markets, country 1 and 2 differ in focus regarding product lines which gives;
 - Different sales process.
 - Different delivery process.
 - Country 1 Shorter cycles for projects, days/weeks/months.
 - Country 2 longer projects 1-5 years.

This in combination with a lack of understanding of the strategic thoughts behind the “Why?” once again creates the distinct possibility of strong resistance within the local management teams to an implementation of the proposed IS as it lacks the expected functionality. X has empathically stated, in regards to removing any of what they consider as key functionality within their organization, that;

“None. It would stop for me. It's not... There's no question about skipping one.” (Y1-21, 22, 23)

If there is a distinct chance of this happening in other countries too, the project will never be delivered on-time, on-budget and with expected functionality.

The local differences will also have an effect of the outcome of a “Go/NoGo”-decision within the organization;

- Legacy systems effect on a “NoGo”-decision.
 - Country 1 – Would then have to find or create a local solution.
 - Country 2 – Would continue with their current localized solution.

This shows that there is a strong local difference in approach on how to solve the issue with “NoGo”-decision, based on legacy system availability, there is also the local effect of legacy systems on willingness to make concessions. Country 2 has a legacy CRM-style implementation, while country 1 does not. This will potentially cause further non-alignment between local and global business goals for a new IS. Our empirical data shows that there are local differences implemented today in the current ERP-system:

“The other problem is that we implemented Customics as a local system, we entered as an empty system and we did all the set-up...so it is a very [Country 1]-setup. And it is not a global system with [Country 3] and all the other (soviet?) areas...” (X1-75)

“X-Yeah, yeah...all different set-up for them...and in [Country 1] as we were the first one to use Customics, we were that pilot. And it was empty...we preferred that they sent us an empty version and so that we could fill in as we wanted... So this is really specific of our way of working...” (X1 – 77)

A consequence of this is the serious possibility of a lack of alignment within the organization regarding the expected functionality of the new IS. Especially when said functionality is not balanced against a clearly defined “Why?” with a clear definition of what problem needs to be solved by the proposed IS. This will have a negative impact on the expected ROI and CBA for the proposed system as it will lack a good alignment of its functionality with the current business processes.

A side-effect of our research was that we put the interviewee’s X and Y in direct contact with each other. According to them they had never met before and not discussed the proposed IS at all, though both worked with the current global ERP-system in their respective country. This information put together with the set-up of each country team showed support for the findings of Rank (2008) that there is much vertical vs. none or little horizontal cooperation in regards to strategic decisions.

5.1.5 Cost-Benefit-Analysis

We have understood that the CBA is a key to a “Go”-decision. W mentions the need to create a CBA for the executive team’s strategic decision in our first meeting and our empirical data support the importance of this;

“...well, W has to report something like that I assume...” (Z1-67, authors’ translation)

“It’s like that with almost everything we do today, so that is the kind of analysis the CEO demands.” (Z1-68, authors’ translation)

It may have been considered to be cheaper to use a CRM from the same provider as the current ERP system, with savings particularly in *integration* costs. This is however not a certainty as we can see from our empirical data;

“I don't think so...they seem to make the CRM common for everyone. I do not know if this CRM will be well connected to our ERP system, you see.” (X1-78)

“But we are not so sure that the CRM that is in Customics will be the best one for us.” (X2-20)

“At the moment we don't know what's in the CRM in Customics. So we are not so sure that it will fulfil or not what we need... I think we don't have so much choice because everything is in Customics by now so... That would be better if we had something that is from the beginning to the end the same software.” (X2-22)

By pre-defining the CRM already in the *feasibility study* the choice of IS looks to the management, involved in the study, to have already been made by the executive management. What motivated this we have no solid information on but based on our empirical data we can deduct what may have motivated this move.

Minimizing the resistance to change could be a reason since there is already an understanding and acceptance of the current ERP-system within the organization and the choice of a CRM from the same provider could theoretically overcome or ease the acceptance of the new IS. We lack support for this in our empirical data as our focus is not on resistance to change inside an organization.

6 Conclusions

We set out to, with the specific purpose of finding out if our hypothesis, based on our own experience and previous research on failed IS implementations, could be verified through a case study.

H₀ = "Executive management makes concessions in functionality in order to achieve a "Go"-decision, potentially leading to project failure."

Based on our empirical findings we find that our *H₀* is correct, and that the problems that can lead to a potential failure of the IS-implementation occurs all ready at an early point in the strategic decision-making process.

Our findings in this case show how a failure to understand and communicate the “*Why?*” leads to uncertainty in the organization regarding the “*What?*” and this will affect the “*How?*”. We found that the issue is extremely complex and we cannot see that there is a set checklist that can guarantee a successful implementation.

We were given a unique opportunity in our research to be able to interactively follow an ongoing decision-making process, where the empirical material we collected was done inside the organization in real-time. We were given full access to the materials created and collected from the beginning of the process, giving us an in-depth understanding of the information created, collected and structured “as is” without alterations and later additions.

Though our research is done using one case, which may limit the possibility of generalization, we can still see that there is a strong possibility of a strategic IS-project failing due to lack of realization and understanding of the “*Why?*” it is needed. We see the possibility of an escalating “domino”-effect that leads to a failed implementation of a strategic IS due to this lack of understanding.

Going back to our original case research model (see figure 2.1) we can now see the “*Gap*” in the flow of information in the strategic decision-making process, which begins with the lack of a clear understanding of “*Why?*” and how it affects the understanding and acceptance of the “*What?*” and thereby the “*How?*” within the organization. As we can see, this can and will most likely have a negative impact on the outcome of the proposed implementation triggered by the “*Go*”-decision. How does this happen?

- **Current IS project models do not adequately address the strategic feasibility phase**

In our research we found that the most common project models used today do not adequately, if at all, cover the strategic feasibility phase. We could not find any concrete reference to their interface with the strategic decision-making process. Nor any reference to any feasibility study performed as part of that process in order to clearly define the perceived problem area and what *functionality* would be needed to solve it. This is an important “*Gap*” that needs to be covered adequately to remove issues with alignment of strategic business goals and

processes and their supporting IS solutions.

- **The functionality needed is not defined before the “Go/No-Go”-decision is made**

Based on our own experiences with personal involvement in three implementations of large ERP-systems in international corporations, we originally concluded that the key issue was alignment of the IS with the business processes in the *implementation phase* of the project. Due to our empirical findings in the research performed for this study we may have to revise this experience based conclusion. We have realized that one most probably must look at a much earlier stage of the whole process of a strategic IS implementation, and begin with the aspect of “Why?” the original “Go/No-Go”-decision was needed, to find the source of any potential failure of later implementation of a strategic IS.

Our empirical data from our case study shows that there is a strong need for collaboration and cooperation within the Company. This need is most likely created by the way that it has grown through acquisitions. According to a source inside the executive management there has been a stated policy of non-involvement in local businesses that have been merged. This policy has now changed and due to the Company’s new size and globalization, it has been decided to streamline internal systems in order to achieve benefits from this growth.

There was no mention in the original *feasibility study* material we received from the Company about any synergy effects of the proposed CRM-system, except for its possibility to theoretically merge relatively seamlessly with their current ERP-system (see Appendix A). Based on this we perceive a lack of analysis and definition of “Why?” the new system is needed from the executive management. As Guth & MacMillan (1986) pointed out the individuals understanding and commitment is of importance to successfully achieve a common goal, this can only be achieved if there is consensus around the goal to be achieved. The lack of such a common goal will potentially have a negative effect on the timeline of an implementation phase, due to divergent goals.

- **Decision-making, responsibility, knowledge and understanding.**

Mintzberg et al. (1976) characterized a strategic decision process by its novelty, complexity and open-endedness. The executive management is ultimately responsible for any strategic decision and its implementation. In the case of a strategic IS this is no different.

Our empirical data and our research show that there is limited or no need for any technical knowledge on the management’s part during the strategic decision-making process preceding a “Go/NoGo”-decision. The technical issues show up later in the “How?” phase of the project, after the “Gap” from our case research model (see figure 2.1) has been bridged.

What is needed is a solid understanding of the business operation and its processes. Guth & MacMillan (1986) are clear on the importance of understanding as a key part in the decision-making process to achieve a common goal. Based on this understanding the executive management can define “Why?” they need to make a decision based on a perceived problem. They could then define the problem better by gathering relevant data and information supporting the need for a solution. This is the basis for the *feasibility study*. There are many

tools that can be of help, some that we see are;

- Documented processes (ISO certification)
 - Important that they are updated and reflect the true state of how things are done
- Decision Support System (DSS)
 - Be able to reflect simulation of organizational changes
 - Be able to give a possibility to run scenarios related to proposed IS
- External consultation
 - Should provide business and process knowledge, not necessarily IT/IS skills

It is also important that the process followed is iterative, Mintzberg et al. (1976) points to this and to the fact that the process should be done in several steps over a longer period of time. We have seen the iterations in the Company's internal study, but the executive management still has a responsibility to clearly communicate the "Why?" they are performing the study, i.e. which problem they perceive needs a solution. According to our empirical data this message has not been clear and shows in a lack of understanding, that leads to different assumptions within the organization regarding the need for the new IS and what to expect from it. This will potentially lead to a perceived lack of delivered functionality in the proposed IS after implementation.

- **Politics is NOT a black box!**

Parker and Benson (1990) mention risk factors to consider regarding decisions involving any change in an organization, these include organizational risk, IS infrastructure risk etc. No matter how it is defined, politics in an organization deals with people and power. A lot of the issues that we saw are based on the individuals evaluation and understanding of a situation within the context of their work situation.

A strategic decision process does not start with clearly defined goals and parameters (Mintzberg et al., 1976); it is rather more often triggered by a perceived need of some kind. The need for a specific decision is situation dependant. It is however important to keep the individuals involved informed of why a decision needs to be taken as well as any progress or lack thereof. Feed-back on information given is also of importance as the individual will then feel empowered to affect the outcome of the decision. Guth & MacMillan (1986) writes that understanding and commitment are important in order to reduce the likelihood of any particular decision being met by counter-efforts or disinterest.

Mullins (2010) brought up the informal organization as an additional source for communication in a company. We saw this most clearly in how the different countries approached the handling of the internal *feasibility study*, through the amount of delegation of responsibility and power to influence or even decide on the responses given.

Knowledge is power (Bacon, 1597), and we could see from our interviewees that the psychological impact of relevant information should not be underestimated. Though it was not the focus of our research we could clearly see how the lack of feed-back and information negatively affected the motivation of the people involved in the *feasibility study* performed by the Company. The effect of this is hard to estimate, but the risk of losing the support of the internal advocates for the proposed new IS can be seen as high and would most likely have a negative effect on the internal acceptance it.

6.1 Generalization of our findings

It is important that caution be used when generalizing from our findings. All organizational structures are different, which makes each case unique. In many cases the difference occurs due to the nature of the business the organization performs. Our focus and results have been on the strategic level of the decision-making process, this means that the findings are relevant for organizational activities at that level.

What we have found, based on our new experience and understanding of the issue after this research, is that the scope of our subject is wider and more complex than what today's IS/IT project methodologies cover. It is of vital importance to look beyond the IS focus and create a solid understanding of the organization and its strategic needs if one is to successfully implement an IS that is aligned with and truly supports the organizations goals. This involves creating a commitment for the common direction from all team members based on acceptance and understanding of "Why?" there is a need.

Through our empirically conclusions we have had to rethink a lot of our own experience based understandings, we see the following areas as interesting for further research in the area of decision-making processes impact on IS implementations.

- Understanding of strategic IS decisions impact by the executive management
- Understanding of the organizations strategic goals by the IS/IT project management
- Strategic alignment of business and IS processes
- Understanding of local differences in an organization and their impact on the strategic IS decision-making process.

With our empirical findings added to our practical experiences this research has given us new insights into the complexity of the issue and a better understanding of the importance of the many aspects of strategic decision-making in an organization.

Appendixes

A – Responses to Company’s internal feasibility study

CRM pre-study – questionnaire 1 feedback

Deliverables

Deliverables are the tangible results that should be achieved from the introduction of CRM

1) This is how you collectively prioritised in order of preference:

Feedback

- viii. CRM should provide accurate information on future business potential
- ix. CRM should be a way of minimizing the time spent searching for information
- x. CRM should be a tool to help make strategic decisions
- xi. CRM should be a tool to improve customer satisfaction
- xii. CRM should provide a management tool to measure sales efficiency
- xiii. CRM should provide information to enable more effective marketing campaigns
- xiv. CRM should be a way to link the business units across the Company group

Other prioritisations – to provide more sales

2) These were your collective preferences in descending order :

Feedback

- i. The CRM should easily synchronise when travelling
- ii. The CRM should easily link to other software
- iii. The CRM should have the possibility to support project management
- iv. The CRM should be in a known format, i.e. Microsoft outlook
- v. The CRM should have a quotation function linked to the customer and also sales order processing

3) Please state how you see the operational maintenance working

- a) The CRM data should be updated and maintained by the field personnel*
- b) The CRM data should be updated and maintained by the marketing team*

c) The CRM data should be updated and maintained by the internal sales support team

Feedback

Actually this was a slight trick question, as most people noticed, because a well implemented CRM is maintained from any user point, as long as it is set up with the correct permission levels for data input.

This should not be confused with maintenance in terms of setting fields and system functionality.

4) What are the key ways in which you see CRM adding value to our business?

Some key feedback points to this question:

- Evaluation of customers performance
- Possibility to follow a complete business case from first contact via quotation to order and delivery ending with reference data
- One source of customer data for all employees despite location
- By having a complete customer overview and connecting projects to contractor, architects and consulting engineers. Then we can work with the customer and the projects and connect activities. This will optimize our way to the market, and the internal cooperation.
- It should give to us information about what we should do, i.e. the amount, quality and direction of sales activity
- CRM will enable us to collect and gather information with accessibility for everyone
- CRM will make prospecting easier and more efficient
- Developing marketing strategy
- Customer loyalty
- Efficient customer service
- Continuous control of information (on different levels, e.g. project level, marketing level etc.)
- Possibility of data mining
- Just in time project information
- CRM should be the backbone of our organization. Every employee has access to the most actual information regarding customers, projects, sales actions etc. Furthermore everybody has the same information.
- Possibility of Direct marketing, sending out newsletters etc.
- That we can store all information about the customer and projects in one place. For example: e-mails sent and received, notes from phone communication etc.
- Our business is project business. The more we wait with CRM implementation, the tougher it will be to reach future goals.
- Will automatically put a business/customer process focus on us.

- Forming field sales and office sales to one efficient team with a common set of up-to-date info. = Better quality in the sales process and time efficiency.
- All relevant info is at your fingertips about the client, the projects, the different stakeholders, sales and profitability, quotations, lighting designs ... + the links between the information so that you can search in different ways . This includes what the client involved in, how does the client perform, who are the other stakeholders in the project , business info (designs, quotations, letters) related to the client or the project .
- If you have all information in one place, you can be effective and spend more time with the customer.

5) *Please state any other issues which you feel are important to consider as deliverables at this stage. We can take it as agreed that cost will be an important deliverable from a regional and group perspective.*

Your feedback:

- There is another project running, managed by *****, called “dokumenthantering” (Document handling) that may have an influence or positive contribution to a CRM. Especially the part about storing, finding, making available documents in the organization. Could be quotations, letters, lighting designs, drawings etc etc.
- Who is going to cover the costs of CRM implementation?
- We should be sure that we are using a program which is well known, and has received good reviews.
- Training and manuals
- Clear formats how to migrate data
- Accessibility of CRM (e.g. speed) by field personnel
- Archiving project data
- Management reporting
- Please integrate business processes like Complaints and returned goods (backward logistics) into CRM
- Item management in general (Product descriptions are for instance important for professionalizing quotations)
- Sales representatives should have access to CRM without being connected
- Every country has a special business so a special way of working, it might be difficult to find a common CRM setup for everyone
- The system must be a tool that can optimize the daily way of working. Besides that this will give us a better overview from a management point of view.
- There are many standard systems available. Please do not create a Company unique solution as this will cost considerably more and complicate the process.

CRM pre-study – questionnaire 3

Structure

The structure aims to look at the practical issues, who, when, how and where.

CRM is our new GPS system, but it will not drive the car for us.

- 1) Thinking about who would take overall responsibility for CRM in your market, what is their job function within your operation?**

Feedback – W

There is feedback that it is planned that there should be a variety of senior people looking after CRM throughout the group. This should not be a problem, but it is interesting to see where this responsibility lands in each market.

- 2) Do you have staff who has previously (or currently) worked with a CRM system and approximately what percentage of total users does this represent?**

Feedback – W

Generally there is a low level of experience as an overall percentage of our staff. This highlights the need for good preparation, introduction, training and measurement of success

- 3) Bearing in mind the key deliverables we have already identified that we wish to supply, what degree of complexity do you see in the implementation of CRM into your organization? (Although the list of deliverables on the feedback document look extensive , I have to say that there was absolutely nothing there that was a surprise) I appreciate that this is partly hypothetical because we don't know the details of the software yet, but please assume that it will be fairly standard and in a user friendly format which will accommodate our wish list with a minimum of customisation. The complexity refers more to possible changes in daily working practice. Please mark potential complexity between 1 (low) and 10 (high) and add any further comment.**

Feedback – W

Generally the feedback is that the anticipated complexity is on the lower side. There seems to be a shared view that we also want to keep it that way.

Specific deliverable complexity issues of concern include:

“the data transfer and recovery”

“exporting and importing files (from Microsoft office documents to CRM for example)”

‘The biggest problem is always that everyone will use and update CRM. That is why it has to be as easy to use and as user friendly as possible. The software must have lot of functions, for example an easy to use sorting function.’

- *“The working methodologies within our sales office probably will not change. Today we are working with 3 different software systems, CUSTOMICSDynamic (=ERP), another CRM and CS2 (=Quotation). By implementing Customics CRM we are integrating these systems into one and the same. Complexity reflects understanding the new system. This means emphasize on training and early involvement of our staff. Parallel to this the rules how to fill in the fields must be clear and described well.”*

4) When we look into the process of change management, considering key success factors in engaging staff into using CRM correctly, how do you see the following issues? : Agree / disagree / any comment

- (i) Employees will alter their mind-sets only if they see the point of the change and agree with it—at least enough to give it a try.
Feedback – W - overall agreement
- (ii) The surrounding structures and processes must be in tune with their new behaviour. (CRM is not the answer to all their problems)
Feedback – W - overall agreement
- (iii) Staff must have the correct skills to do what is required of them.
Feedback – W - overall agreement
- (iv) Staff must see people they who they respect modelling it actively.
Feedback – W - my apologies that a lot of people did not understand this point, possibly down to my choice of English. What was meant here was that where we have a matrix of people at different levels of knowledge and access within the system, that they should see people at a higher level demonstrating the usefulness of CRM and helping to find solutions to problems. It sometimes becomes the case that when problems are experienced that everyone doubts and challenges the system, which is not helpful or productive if the leaders join in. A positive belief that all issues can be resolved is essential for success and universal acceptance.
- (v) Each of these conditions should be realised independently; yet together they add up to a way of changing the behaviour of the people in your organization by changing attitudes about what can and should happen during their working day.

Feedback – W- some varying comments to this. Most agreed, but some had other views;

"All these conditions are linked to each other and therefore they cannot be realised independently."

How can employees best be equipped with the skills they need to make relevant changes in behaviour? First, we give them time. Employees can't learn merely by listening to instructions; they must also absorb the new information, use it experimentally, and integrate it with their existing knowledge. In practice, this means that you can't teach everything there is to know about CRM in one session. Much better to break down the formal teaching into bite size chunks, with time in between for them to reflect, experiment, and apply the new principles. Successful and sustainable change happens only in steps.

People assimilate information more thoroughly if they go on to describe to others how they will apply what they have learned to their own circumstances. The reason is that human beings use different areas of the brain for learning as for teaching.

Feedback – W - general agreement; plus some specific comments

"The note is absolutely truth. In previous IT implementation projects I have noticed and experienced that teaching and learning is a very, very important part of the implementation process. First of all the changes and the new way of working should be clear to everyone. Secondly the basic functionality must be clear and fully understood and guided with manuals. Thirdly step by step training (modular) is preferable. People absorb information in a much better way."

"We need to spend some money for implementation since this is the training process. Going to neutral place, switching off mobile phones and having fresh brain seems to be the key. Moreover – participants need some homework during each training sessions."

"It is necessary to give the people clear information on the goals and methods and give them space to bring in their own methods and experience."

- 5) When we consider these change management issues, do you feel equipped to handle this or do you foresee outside help will be required? If yes, what level of support do you require? (Again , this is not about software or associated training for navigating the program)**

Feedback – W – I am please to say that the majority feel quite equipped to deal with this.

"As our "key users" team worked on Customics set up and implementation, they feel confident in handling this."

"I think that we will use the same formula as we used when we implemented Customics. Educate super users, who educate the rest of the organization."

- 6) From a management perspective, how do you see the need for access levels working, i.e. super user, full access, management access for reports and surveillance, standard user and read only user?**

Feedback – W – it is agreed that these should be set as a security measure as well as an operational matter. It is important to protect the global view of all data.

"We need the same access as defined in Customics. We have already decided who are the super user, key users, and standard users and read only users."

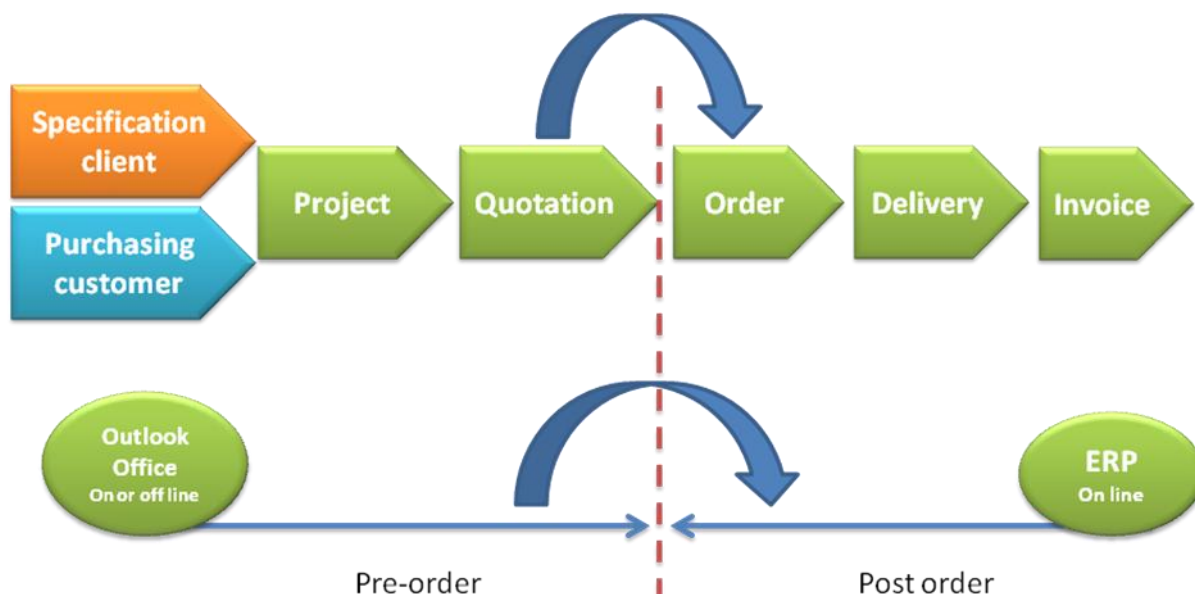
"It should be able to determine different access levels. Most likely we have the super user(s) users and management. All should most probably get a different entry level. For this reason we have to be flexible in setting up authorization levels. At this moment I cannot tell who must have which authorization. In our current CRM system everybody has the same access level....this is not the most practical solution."

"I think it is important that we divide the access levels into the example you have given. There is no need for everyone to have access to reports an surveillance etc. which is reserved management or super users. This will also make it simpler for the common user."

- 7) Do you have any other issues regarding access levels and security?**

Feedback – W - important to have a clear centralized policy

- 8) Looking at this simplified view of the process from prospect to invoice , do you agree that CRM will play an important role in creating a visible link to each function within pre-order, and ultimately allow a quotation to order transition which is within the same system ? Any further observations?**



Feedback – W – there was general agreement with this although some questions around where the red line between pre-order and post order should be drawn. Perhaps as long as the process flows seamlessly, this is not so important?

“If you have a look on the scheme which represents our system process at the present time, you will see that quotations are not part of CRM module but “accounts receivable” module. The issue is to be sure that we will be able to transfer data easily and safely, and also to make quotations the same way as we do it today.”

“Will also link to historic data we can use to be more successful.”

“Within the pre-order process CRM can manage the work flow and provide signals.”

“It is incredibly important to have a CRM-application that ensures that all stages of the process are met.”

9) From a user level perspective, we need project or customer records to be viewed by multiple users. Do you agree that we will need to have standardised ways of logging information? Comment?

Feedback – W – the agreement that this should be standardised and well documented is clear.

“Yes, we have to have a process and standard method of how we input information to the system. Not only logging, but also what information, when, how and in what format. There must be only one way to work”.

“It is very important that all information is entered in the same way. It would also be an advantage to have readymade templates on how to add new customers, executives, etc.”

10) Please state any other issues which you feel are important to consider as structural at this stage. The way in which this all integrates as a part of your network and IT system is for later on.

"I don't like if there is too many software programs which employees have to start every morning."

"Everyone should have the possibility to update CRM where ever she/he is."

"We have many customers who buy from us (customers inCustomics), but contact companies like architects, consultants etc account for a lot more. CUSTOMICS and CRM have to communicate well together."

"It has to be easy to input emails etc to CRM."

"Some more experience from the CUSTOMICS roll out shows that training in steps and follow up training arranged by project management and to all is important. A strong organization of local super users to help colleagues and finally a central helpdesk organization that the super users can address. CRM system owner and coach centrally and locally"

B - Interview guide

1st round

Project: Company CRM implementation

Date: 20__ - __ - __

Interviewee: _____

Position: _____

Interviewer(s): _____

Location: _____

Confidentiality requested (ASK) Yes No

(Brief introduction to project, purpose etc)

1. Why is this system needed?

2. Which are the 3 key functions needed in the new system?

3. Which of these key functions would you remove to achieve a "GO"-decision for the project?

4. What would be the effect of removing this key function?

5. Would you actively work towards implementing this removed key function later in the project?

Other notes:

(Thank the interviewee. Assure them of requested confidentiality now and in the future.)

2nd round**Project:** Company CRM implementation**Date:** 20__ - __ - __**Interviewee:** _____ **Position:** _____**Interviewer(s):** _____ **Location:** _____**Confidentiality requested (ASK)** Yes No *(Brief introduction to project, purpose etc)*

0. New/Additional questions based on first interview?

1. *Why is this system needed?*

a. Have a Go/No-go decision been taken? New project info?

2. *Which are the 3 key functions needed in the new system?*

a. Who decides which functionality should be included in the new CRM system?

b. Who will be the key users of the new system?

3. *Which of these key functions would you remove to achieve a "GO"-decision for the project? N/A*4. *What would be the effect of removing this key function? N/A*5. *Would you actively work towards implementing this removed key function later in the project? N/A*

6. Who do/have you cooperate(d) with in this project?

a. What is their role in the organization?

b. What is their role in the project?

7. What is your boss thoughts/reaction to this project?

Other notes:

(Thank the interviewee. Assure them of requested confidentiality now and in the future.)

C – Internal feasibility study timetable

Day	Month	Action	Date	Participants	GMC	IT	DF
1	September	Participants background document and introduction issued	01-sep				
2		Present plan to GMC	02-sep				
3				03-sep			
4		Participants questionnaire 1 - deliverables	06-sep				
5		GMC questionnaire - deliverables	07-sep				
6				08-sep			
7				09-sep			
8		Deadline	10-sep				
9		Analysis	13-sep				
10			14-sep				
11		Deadline	15-sep				
12		Feedback	16-sep				
13		Participants questionnaire 2 - wish list	17-sep				
14			20-sep				
15			21-sep				
16			22-sep				
17			23-sep				
18		Deadline	24-sep				
19		Analysis	27-sep				
20			28-sep				
21			29-sep				
22		Deadline	30-sep				
23	October	Feedback	01-okt				
24		Participants questionnaire 3 - structure	04-okt				
25			05-okt				
26			06-okt				
27			07-okt				
28		Deadline	08-okt				
29		Analysis	11-okt				
30			12-okt				
31			13-okt				
32			14-okt				
33		Deadline	15-okt				
34		Feedback and overview	18-okt				
35		Requirements analysis - IT	19-okt				
36		Participant questionnaire 4 - scenarios	20-okt				
37			21-okt				
38			22-okt				
39			25-okt				
40			26-okt				
41		Deadline	27-okt				
42		Analysis	28-okt				
43		Deadline	29-okt				
44	November	Cost calculation	01-nov				
45			02-nov				
46			03-nov				
47			04-nov				
48		Deadline	05-nov				
49		Feedback	08-nov				
50		IT analysis and functionality	09-nov				
51			10-nov				
52			11-nov				
53			12-nov				
54			15-nov				
55			16-nov				
56			17-nov				
57			18-nov				
58		Deadline	19-nov				
59		Overall analysis and conclusions	22-nov				
60			23-nov				
61			24-nov				
62			25-nov				
63		Deadline	26-nov				
64			29-nov				
65		Present results to GMC for approval	30-nov				
66	December	Feedback	01-dec				
67		Communication plan	02-dec				
68		Implementation plan	03-dec				
69			06-dec				
70			07-dec				
71			08-dec				
72			09-dec				
73			10-dec				
74			13-dec				
75			14-dec				
76			15-dec				
77			16-dec				
78			17-dec				
79		Handover project	18-dec				

D – Interview protocols

Interview: X1, 22 Nov 2010

Area Coding

P/G	Profit / Gain
AiO	Acceptance and understanding within the organization
GC	“Go” concession (CBA)
CE	Concession Effect
CA	Corrective action
LS	Legacy System

Index	Area	Transcript
		M-Leave it there and forget about it. Ok, shall you start to go through some information that we need from the top of our questionnaire...
		A-Today’s date is...22 ⁿ
		M-This is more for our references so we know whom did we talk to and when did we talk
		M-We even have a little box for confidentiality and ask Yes or No, we have already...we fill in yes from the beginning so people can feel comfortable...
		M-You have the name and all, position...
		A-What’s your position?
X1-1		X-I am the customer department manager...
		M-How many years and what did you do before that?
X1-2		X-Same job but in fairs and exhibitions...I was trained to work the whole exhibition there was this one in [Country 1].
X1-3		X-Great, nice job... but very, very busy...
		M-Odd hours...
X1-4		X-Yeah exactly...
		A-Oh, sorry, what was your name...
X1-5		X-X...do you need last name...
		M-Yes...
		A-No, we have it...
		M-Like I said we have 5 basic questions, and it starts about relatively unimaginatively...you can put it that way...and this is your point of view we are looking for, so our first question here is why is this needed in the first place? From your point and what you see...

X1-6	AiO	<p>X-We implemented a new ERP two years ago and we have seen the limits of it. I mean we can make quotations, sales order and everything... but we are missing the part which is before and all the sales representatives have a lot of information and they have nowhere to put them. And they can't follow their business, that's one part; the other thing is that we would like to have some place where we can put information about market, price, market price, product information. All this thing we are quite missing, all this information for the moment, so we would like to have a...somewhere to collect the data. And share information, and then to adjust our solution, our offers and everything... regarding this...</p> <p>M-So what are the key benefits from this for the sales person...?</p>
X1-7	AiO P/G	<p>X-Yes, well it's for them and especially for the boss, who will manage them to decide how to...orientation, make strategy and everything. This will enable him to make the orientation of the company and where he want the company to go.</p> <p>M-How do the sales people work today then?</p>
X1-8	LS	<p>X-Well, they have Excel tables and they put everything there and well, they just follow their work this way. So it is easy for them and for the boss's work too...</p> <p>M-Does everyone run their own spreadsheet versions...or is there some standardized?</p>
X1-9	LS	<p>X- Yes, there is some shared table and they put everything there, but...we did that since we knew that we gonna have a CRM, so we did that in Excel-format just to import that in the new CRM...</p> <p>M-So how long...the Excel sheets just came in recently?</p>
X1-10	LS	<p>X-Yes, this is quite recent. Probably 3, 2-3 years ago...</p> <p>M-Ok, and the ERP-system, came in about the same time?</p>
X1-11	LS	<p>X-Yeah, probably...yes I think it did...2-3 years...</p> <p>M-If you look at something like a system like this, it will probably have an impact on the organization, what will be the major impact, do you think, on the organization...is only for the salespeople or will it be used by other people in the organization?</p>
X1-12	AiO	<p>X-I think they will be the start of this and then it will have an impact on all the other characters(?)...I mean...what they will do we will have the information for the customer department, we will have the information and we will centralize everything and we will have to refresh the information when they call or something like this... so I guess everyone will be infected until the end. Probably not the logistic but the...I think yeah.</p> <p>M-When you look at the system per see and so, if you should mention three key functions, you already mentioned the sharing of the data, what else? You mentioned another factor...you have two more factors that could be...functions that could be important that are very key to support the business?</p>
X1-13	AiO	<p>X-I don't see anything now, but I think...a salesperson will not be the only one with use it, we have marketing persons as well and..It's quite hard for me to say because I don't know exactly what this will...</p> <p>M-What do you expect..? What would be the benefit for you from this point of view? What would be your key?</p>
X1-14	AiO	<p>X-Well for me it is quite different, because I just see my department, so I have to have a look more... I think this will be very, very important for us, and the customer department, we are the centre of</p>

		<p>the organization. We try to centralize all the information and we try to share it with all the other department and now the sales representative will have to share more data than they do now. So that will change a little bit our organization, while our organization at the moment so...quite hard for me to say what will be infected on us and I don't know what they can do...</p> <p>M-I think it still is fairly open-ended and it is still up to if you can define the functionality you are interested in, I think that can help you in this case. What goes in the system too? Because as you said CRM systems can be very different depending on how you want to implement it and use it for. So there can be... So in your role in this is system you will be able to collect information and centralize it.</p>
X1-15	AiO	<p>X-Yeah...</p> <p>M- You have a better opportunity to distribute the information, is that right?</p>
X1-14		<p>X-Mhh...(Yes, nodding)</p> <p>M-So you already today collect all the information and redistributes it out to the sales people regarding everything you can get that is connecting...that you can get...</p>
X1-15		<p>X-It is more, for my part, it is more that the information which is...how can I say it...it is more the information which is around product information, but not the launch of product...</p> <p>M-I understand the difference...</p>
X1-16		<p>X-It is not the above information; it's the executive information...</p> <p>M-Post Mortem...</p>
X1-17	AiO	<p>X-Yeah, the operational one...so what we would need is more its the information that is really above everything, so we will continue to distribute the information but I think that the information will be more...identified, see what I mean...</p> <p>M-You work with the marketing side too?</p>
X1-18		<p>X-Not that much by today...</p> <p>M-Will they also be connected and using this?</p>
X1-19	AiO	<p>X-Well, marketing is more connected with the sales representative at the moment, but that would be great if we have more information from them. We would know what would be the new product and everything, our market better. Because now we are only working day-by-day I mean in our department and would like to have another vision of the market. So that would be interesting...</p> <p>M-To be able to slice the market and see different areas and so on...?</p>
X1-20		<p>X-Yeah...</p> <p>M-Taking some notes here...</p> <p>M-Eventually when it comes to these kinds of systems you come to the time when they are asking everyone, so they are going to decide on a Go/No-Go decision down the line and so on. Is there any functionality that you think is critical that you would be...that if it was taken away would be a problem for you? Is there any function, as you talked about, I mean collecting the data is one thing, that is just a question of getting the input. But you were talking about how to use the information. Is there any function that would seriously, if taken away, would seriously harm what you see as the benefit of this system? Your point of view...</p>

X1-21		<p>X-Mmm...</p> <p>M-We are not talking about exact details...it is more like the function, distribution to a certain department or something like that. Not a specific area... And if they say, well we can do this but sorry we have to take something away. It is always a cost thing with functions that's a problem...</p>
X1-22		<p>X-Yeah, yeah...</p> <p>M-And everybody wants a lot of things in... Did you answer or respond to some of those questions that came out from W? You haven't seen them?</p>
X1-23	AiO	<p>X-Well, the questions we received I just answered with my boss and with the key user. We went through it but the questions very general. And we don't know what are the functionalities of the CRM. The exact functionalities, what will be implemented, by now.</p> <p>M-I think it is the other way around; they want the feedback so they can know what you need to have implemented to do your job. So back to the key thing, you said that collection of data is very important, that is a key function, the other one is distribution of data. Which departments did you say...sales, you need to exchange information with sales.</p>
X1-24	AiO	<p>X-And marketing...</p> <p>M-Marketing, yes...</p>
X1-25	AiO	<p>X-I guess logistics too...when I mean logistics it's logistics and purchasing. It is more about product and all the product parts would be interesting to...???...information chain(share?).</p> <p>M-Logistics', that are things that you can get out of the ERP currently? Is that...the logistics data and information is already available in the ERP system today?</p>
X1-26		<p>X-Yeah, it is...</p> <p>M-You access the ERP today?</p>
X1-27		<p>X-Yeah...</p> <p>M-But then it is not in any format that you can then effectively put it along to somebody else?</p>
X1-28		<p>X-No...</p> <p>M-Cannot forward it in a good fashion. If a sales person who goes in today and asks we have a potential for an order here, what do we have in stock? Can we deliver in such and such a timeframe, how do you go about that process?</p>
X1-29		<p>X-We have two ways of doing that. Either we have it in stock in [Country 1], because we have a warehouse. Either we have to ask [Country 3], so...</p> <p>M-So then the salesperson comes to you or someone in the organization and asks, "do we", "can we"?</p>
X1-30	AiO	<p>X-Yeah...and that's the waste of time because sometime we don't have the answer to when is the date when we want to have it. So it is necessary to instantly have the information we have. But they have managed to improve this because now we have a look on the warehouse in [Country 3]. So we might have that information.</p> <p>M-So what happens when a salesperson comes in and has an order? Does he come with a piece of paper and drop it on someone's desk and then its manual work from there?</p>

X1-31	LS	<p>X-It depends...sometimes he...most of the times he writes in the mailbox, the general one. Sometimes it comes from the sales representative in through a mail with all the references and everything so, yeah so...that's the way we do now, but that will be easier if the say; Ok I made an offer and this one is ok...</p> <p>M-How can the salesperson then follow up the order? If he places...he sends a mail and can he go in and check what the status is?</p>
X1-32	LS	<p>X-Yes...he has an access to the ERP system...he can make a filter on his name and he can see only his own orders.</p> <p>M-But he has no way to connect it to a customer database, with his customers, so he can see what status is on all of them.</p>
X1-33	LS AiO	<p>X-Customers are not related to one sales representative so he can't see all his customers by now, maybe later we can have a look just on his customers. But now, no, we just have big customers database. Main problem, I just go back to the key problem, its more about sales representative if the always on the road and you know. They need to connect to CRM, if they are in place where they not have WiFi system...they must be able to fill in all the information they have without being connected.</p> <p>M-So when they get the connection it gets updated. So they can fill it on their time...</p>
X1-34	AiO	<p>X-Yeah, exactly...and sometimes synchronize. But they must be able to update the information they have.</p> <p>M-So that it an important factor that that works, with the synch?</p>
X1-35		<p>X-Yeah...</p> <p>M-The connections, marketing, sales...?</p>
X1-36		<p>X-Purchase...</p> <p>M-You are giving us a good picture for us to understand how things work... so we understand what interaction is done and put you system in context. That is something you (we) have to learn through the first interview...</p> <p>M-The CRM system is usually very sales oriented...very often to support the salespeople in their work with information and data. That will help you in your department if they can have more access, more smooth access if I understand it right.</p> <p>M-The thing is as I look at our questions it is interesting because our questions takes us off on a different tangent, but I realize now that we talk about it there are some things about our questions that has to do with Go/No-GO decision is going which part as really the key functions and I understand now that it seems like it has not really been made clear to you a CRM system can offer. It seems that there is a lack of information about what possibilities there are with the CRM system.</p>
X1-37		<p>X-Mmm...</p> <p>M-That makes some of our further questions interesting. It is hard to say...you can't talk about what happens when you remove a certain, key function, if you don't know what the possibilities are so to speak. What would happen if this was taken out? I can ask what will happen if the salespersons cannot synchronize the data for instance, is that a key factor, what would that do? Or so on, but it's not still defined as for you and your work and for what you do. It's important for the sales group that they can do this and it would help you of course the information is updated... as quickly as possible so you get it into the system. As far as I understand it, correct me if I am wrong.</p>
X1-38		<p>X-No, it's ok...</p>

X1-39	AiO	<p>M-This is just to get an understanding that we have understood what the situation is like. You cover all of [Country 1], right? You have salespeople everywhere...all over the country or?</p> <p>X-No, we have 4...no 5 sales people. And they are divided, 2 are retail market and 3 are professional. And then they are divided by regions. 1 is for Lyon and this area, 1 is for the Alps (SE) and sometimes Paris. And the other one is around Toulouse and ???...</p> <p>M-So they have local offices? Or they all travel out of Lyon?</p>
X1-40		<p>X-No, yeah, they travel to Lyon but most of the time they work from their home.</p> <p>...X takes out documents from W!</p>
X1-41		<p>X-Maybe this will help you to see what we know by now. Here...We received this...</p> <p>M-Pre-Study process, that is interesting...Ok, this is what he gave you, market analysis, product marketing, target client...</p>
X1-42		<p>X-This is the last one we received...about 1-2 weeks ago...</p> <p>M-14, 15, 16, that's huge... how much have you looked at this yourself?</p>
X1-43	AiO	<p>X-I had a look together with my boss and he told me what he wanted exactly on each part.</p> <p>M-This is a little bit of what we were talking about ...functions and things. He looked at this together with you and he pointed out certain things that he thought were key?</p>
X1-44	AiO	<p>X-Yeah...what he thought was important for him. The main thing was for him, everything was quite good, he said that if we have all of this...</p> <p>M-It will be nice..?</p>
X1-45	AiO	<p>X-It will be very, very nice. But there are some little things that would be very important to him. As I told you synchronization, the big issue... one of the questions was how will we import our table and the ground history. The...how we can sort out the criteria...you know...what he meant by that was how the sales representative will be able to sort out all the criteria that...or information. Also the target customer, the first is the suspect then the prospect and then the customer. It was really important for him to have the suspect.</p> <p>M-To do prognosis...?</p>
X1-46		<p>X-Yes, exactly...</p> <p>M-You just gave us that answer to some of the key things here about the key functions needed in the new system, you gave us four...we wrote three because we figured you can't be sure that people have more, but three key functions should be very important to make a difference here...synchronization is very important, I can understand why all of these are important in different ways, from your point of view there...</p>
X1-47		<p>X-Well he knows very well CRM...so he has a better idea than me...</p> <p>M-But you picked it up...</p>
X1-48		<p>X-Yeah...</p> <p>M-That's' an important part here...if one looks at these and if they said "Well, we will have to give someone some of these... well we can give you three of these four for instance, but we will have a</p>

		<p>hard time doing all four. We have this search criteria, which is set, ...but it will be hard to do these others...If we look at these four, and if one of them had to drop out. What would be your thoughts on this system, if one of these four points had to be dropped out? I.e. we can give you three of these but we cannot give you all four. I mean the import function....they are all important functions in different aspects. And that we understand...and I think you have as good a picture as we do of that one...from what you told me...</p>
X1-49		<p>X-Yeah...</p> <p>M-If someone came and said , you can only get three of these...one of these have to go away. What would you think the reaction would be then?</p>
X1-50		<p>X-Hmm...</p> <p>M-We can't give you the search criteria...because it is fixed for example...or the synchronization we don't know...because it depends on other factors that we cannot control...so we cannot guarantee that...</p>
X1-51	GC	<p>X-Well I think synchronization is real big one, so I want this. Quite hard to say...</p> <p>M-If only three of these four could be delivered, would he (the boss) see that as a critical issue in that case, with the new system. Would he say "Well you know...maybe we should look at some other way or something like that"?</p> <p>M-Since you talked to him you heard what he reasoned around it when he said this is important and this is important...</p>
X1-52		<p>X-Yeah... I don't remember...but I guess that if...I don't know...</p> <p>M-Ok, let say that the executive board comes down and meets you here or in a meeting with you and him and says we will give it a "Go", but we will only give you three of these things, one has to be dropped out...what's important, what do you say? What would he say, what direction...and from your point of view, what would you say in this case? I mean you see these as important...since you brought them up in different way before.</p>
X1-53		<p>X-Hmmm...</p> <p>M-Would it be to go look somewhere else or...?</p>
X1-54	GC CE	<p>X-Yeah...well, it's really hard to say because I know that if we can't search by criteria, we...that would be quite difficult...in the work.</p> <p>M-You might be told that they are all customers, the system can't differentiate between them, they are all treated the same way...</p>
X1-55	GC	<p>X-I know that customers and prospects are already done. I mean in the system.</p> <p>M-In the current system that you already have?</p>
X1-56		<p>X-Yeah, yeah...so maybe suspect, maybe ??? prospect, I don't know...</p> <p>M-But you think that if the system was implemented, let's change the line of questioning here, the system was implemented and one of these criteria was not there...let s go with the search criteria. Do you think that you or your boss would work to get it into the process at some point later on and somehow try to get it anyway into the system? Sometimes you can do...give in one area to hope to correct it later on. Is that something that could happen on an occasion like that? Looking at it as better to get the system without all the functionality than to not have anything at all...</p>

X1-57	CE	<p>X-Yeah, yeah, sure, sure... maybe we could arrange something else...with the searching..anyway we will have to adapt ourselves...probably as we have all the information that would be the best and then we'd try to find another solution to...search information. Probably this would be the one we could live without...</p> <p>M-But you would try to find your own solution, or find some way around it?</p>
X1-58	CA	<p>X-Yeah, yeah...definitely!</p> <p>M-I don't know if you can answer this but...would that be done...well, there are two ways of doing that. Either you go on the outside and create or buy a possible solution, the other possibility is to look and see if it can somehow be done from the inside the current project later on down the line. Which approach do you think would be most likely in this case?</p>
X1-59	CA	<p>X-I think we will try to find a solution later on. We have already done that for the actual system. We are missing information and missing functionality so...we found our way of working. So I think we would do that.</p> <p>M-From the point of view of implementing this system...and to connect these different functions so to speak...and you see these tools and so on...if something like the search criteria wasn't there, what would the general effect of that in this case be...what would the major effect of that be, people can't do for instance a search because there is no filter...what would the effect of that be do you think?</p>
X1-60		<p>X-...</p> <p>M-Usually when implementing a system in an organization people get these "toys" or tools...and suddenly they realise that cannot do everything they would like to do... what do you think the effect of that would be?</p>
X1-61	CE	<p>X-Tough question...because regarding everyone represented, with different wants, for information needed. I know there is one with a big, big memory and he does not need the search criteria...because everything is in his mind. So anyway we will find a solution to...to have the information he want.</p> <p>M-From the organizations point of view if you look at it that way...you have this one guy who can do this, but not everyone can.</p>
X1-62		<p>X-Yeah...definitely...</p> <p>M-So for some of the others it might be a key or really serious issue...and as you said your boss brought it up so it must be an important factor. There must be some thinking from a business point of view when he makes a statement like that. Considering that he picked up four key points from all these 16 different things, that this is important, this is important. From that point of view would there be like resistance in the organization, would some of the salespeople not use it they do not have the functions? Would they say that "Well doesn't do it for me...it does not fulfil my needs"....Is that a possibility do you think?</p>
X1-63	CE	<p>X-Yeah, might be...</p> <p>M-Have the sales people out in the field been asked around this, or is it the...</p>
X1-64	AiO	<p>X-NO!...at the moment they don't know...they know we are working on a CRM system, but they are not involved at all...only the boss...</p> <p>M-Ok, my understanding from what you say is that they are key users in this system and it is very important that they use it.</p>
X1-65	AiO	<p>X-At the moment...they are not really key users of the system, the actual system. And they do</p>

<p>X1-66</p>	<p>AiO</p>	<p>everything, as I told you, in their tables... So maybe they will not be the key users of it, I don't know, maybe they will pass on all their information to an assistant or something...and they will do the work of updating the information...</p> <p>M-Will the assistants really get all the information out of the sales people? Based on your experience would you say that they would?</p> <p>X-Not all the time, but if they have to...if it improves their work, maybe they will do it...</p>
<p>X1-67</p>	<p>P/G</p>	<p>M-What would you say...if we turn it around here, if you look at it from the sales peoples perspective, could they benefit from having this system installed? What would be their benefit be, from the salespeople in the field?</p> <p>X-I think it would help us to...know where they are in their business and how they work with this and this customer and how to answer to the customer regarding an offer...tending or...and so maybe... This would be a tool for them to have...to follow up their work. Because by now they are...I don't know how to say, but they are just...running and trying to find business. But to follow the business is very important, for you can't just make offers and offers and offers...and then they never go to sales orders. You have to follow them and to know why this offer didn't go further...</p> <p>M- So follow up is a key thing, to keep track of job offers they have out there and see what their status is and so on...</p> <p>...looking at X's papers.</p>
<p>X1-68</p>		<p>M-So let's have a look at this then...Is this something that W sent out to you?</p> <p>X-Yes, and we were supposed to look at all the scenarios...and input and tell what we expect from all this.</p>
<p>X1-69</p>		<p>M-When did you receive these materials? Long time ago?</p> <p>X-Yeah...two weeks ago...or something like this.</p> <p>A-We have it as well somewhere...I think, I recognise it...</p>
<p>X1-70</p>	<p>AiO</p>	<p>M-Ok, but as we said we did not want to be biased when we came in here, so we would rather see what you have received and what your position is based on that... And this follows the process basically from lifting the phone to selling something, identifying the customer and so on...Is this going to be connected to customer service and support this system or is that going to be completely...</p> <p>X-I hope so...because we implemented our ERP system I get that CRM is going to be part of it, it's going to be a new...a new menu...in the system. Also I hope this will be related to it...</p> <p>M-It goes back to what you said about sharing and sharing information, connecting all the information, one key thing is, and I don't know if this is mentioned anywhere, but it is synchronization of data in different places...so that it is the same in all the systems. That can be quite complex. I don't know if that is mentioned here...</p>
<p>X1-71</p>		<p>X-I think I have this scheme here...</p> <p>M-Ah yes, we looked at that one and I asked W, It's Microsoft Customics, okay, so that is what you are running today.</p>
<p>X1-72</p>		<p>X-we are here...</p> <p>...shows a step ahead (left) of the dividing line on the picture.</p>

X1-73		<p>X-We are have all of this, but we are missing this...</p> <p>M-Yes, we have talked of where the collection goes and where is the gap and what happens...</p>
X1-74		<p>X-Yeah, because we are already using this, so it must be related to the CRM else it is a big miss.</p> <p>M-Yes, definitely...</p>
X1-75	LS	<p>X-The other problem is that we implemented Customics as a local system, we entered as an empty system and we did all the set-up...so it is a very [Country 1]-setup. And it is not a global system with [Country 3] and all the other (soviet?) areas...</p> <p>M-So it's only yours...what are the other countries running?</p>
X1-76	LS	<p>X-They are using Customics...</p> <p>M-With their own set-ups?</p>
X1-77	LS	<p>X-Yeah, yeah...all different set-up for them...and in [Country 1] as we were the first one to use Customics, we were that pilot. And it was empty...we preferred that they sent us an empty version and so that we could fill in as we wanted... SO this is really specific of our way of working...</p> <p>M-Are you going to be the pilot again do you think? Because...</p>
X1-78	AiO	<p>X-I don't think so...they seem to make the CRM common for everyone. I do not know if this CRM will be well connected to our ERP system, you see.</p> <p>M-Do you see it as beneficiary that the CRM system will be connected to the other countries and the rest of the organization? Will that be beneficiary for you? I mean I do understand that you have customers that are not local...The Company has customers that are in different countries and different places, the same customer...</p>
X1-79	P/G AiO	<p>X-Yeah...I don't know...because we are quite on the [Country 1] market at the moment...maybe for later on that would be great...it would be great to have access all the information from the group though. Regarding customers it wouldn't be useful, maybe in two-three years. But regarding product it will be very, very important to have common information...</p> <p>M-To identify key customers? Sometimes a key customer can be...somebody with operations in many places...it might be good to be able to synchronize what's being done...even though when customers when that are big corporations are local too operating in the local market...</p>
X1-80		<p>X-Yeah...</p> <p>...looking at X's papers.</p> <p>M-Projects...you run projects with installations and so on?</p>
X1-81		<p>X-Yeah...we don't work with projects, we should, but at the moment we don't work with projects...and I think it would be a good idea...</p> <p>M-So when you deliver, you just deliver your product and they take care of it from there or?</p>
X1-82		<p>X-Yeah...</p> <p>M-Do you synchronize any work between...you have pre-sales and support so to speak for the sales people, or are they technically very well advanced? Are your salespeople technically skilled so that they can explain product solutions at the customer sites and so on?</p>

X1-83		<p>X-Hmm...most of them and when they don't know the technical part they just ask for it, either to [Country 3] or [Country 1]...</p> <p>M-So you have resources for that, so they send somebody along?</p>
X1-84		<p>X-Yeah...</p> <p>M-Cause that is something that can...a request like that can go through a system like this...</p>
X1-85		<p>X-We have a ...Item?... designer department as well, so ...</p> <p>M-You have your own IT department, local?</p>
X1-86		<p>X-Yeah..</p> <p>...looking at X's papers.</p> <p>M-It's a long, long list of things that you have...contact list, contact information...advertising materials, yes, that was what you were talking about with marketing...</p>
X1-87		<p>X-Yeah...</p> <p>M-Do you do a lot of campaign stuff?</p>
X1-88	AiO	<p>X-Yes, but not enough I guess...</p> <p>M-Well, it is very hard to do ROI, return of investment, on marketing investments anyway...and marketing activities. Creating interaction tools to process needs...recording source of sales lead...qualifying the lead by typing in...that's what he meant when he was talking about ???</p>
X1-89		<p>X-Hmm...</p> <p>M-That was fairly straight forward...you have anything you would like to add right now, questions?</p> <p>A-Not at the moment...</p>
X1-90		<p>X-What was important ..???(44(16).. was the team management to have a view of the portfolio, a view of the number of interviews and everything...meeting, the number of phonecall...</p> <p>M-This is what makes sales people vary about the system...</p>
X1-91		<p>X-Yeah...</p> <p>M-It's a control system...</p>
X1-92		<p>X-Yeah...they don't like it so much...</p> <p>M-Have you said anything about connecting this so called calendar system that's available? Usually CRM's...</p>
X1-93	AiO	<p>X-I think...it should be...I don't really know but it should be...connected to the agenda.</p> <p>M-You have a system today or do you use Outlook?</p>
X1-94		<p>X-Yeah...we use Outlook...definitely...</p> <p>M-Legacy system...ok...when you say project how are you thinking, you said you should run more</p>

X1-95	AiO	<p>projects...In what respect?</p> <p>X-Mmm...in for example if we have an hospital and there is a tending on that hospital, we are several electricians, who will contact us to have the offer, the project is the hospital and we will have several actors for this project...the electrical fitter, as well the architect...and sometimes the ??wholesaler??(46:08)...so we have several actors for just one project. And we have to be very careful how to...how we will answer to them.</p> <p>M-Sub-contractors should be treated carefully...</p>
X1-96		<p>X-Exactly...</p> <p>M-And it is also good to know who is involved in what project...when and where and so on. This explains relatively straight-forward. This was interesting with the projects, since nobody has mentioned that before. What have you been told so far about the proceedings now? You have responded to these queries. ..</p> <p>M-Was there anything, any part or idea that came up during that process that you went through, like we have not thought about this? Like we can do this too with the system...or this is lacking.</p>
X1-97	AiO	<p>X-No, I guess I told you everything that we would like to have in it, the main program, the synchronization...the fact that it has to be connected to our ERP...and that was the main issues...</p> <p>M-When you sat and went through this with your boss, did you agree with the four points that were brought up, that they are key...</p>
X1-98		<p>X-Yeah!</p> <p>M-if I may ask...</p>
X1-99		<p>X-You have to. He really has a good vision for what he wants, and from my point of view I think he is quite good...</p> <p>M-Maybe it is, maybe it isn't...we will see...We don't have much more at this stage...</p>
X1-100		<p>X-This is the first point when we have more information...the two first questionnaires were quite hard to answer...especially when you don't know where you are going...this was quite helpful.</p> <p>M-you are not afraid this will steer you into one way of thinking...Ah, this is a good solution, this is the solution...</p>
X1-101		<p>X-Yeah, maybe...no I am not sure we will have all of this...that would be great if we do but well I am not that sure...</p> <p>...looking at X's papers.</p> <p>M-The blocks are fairly straight-forward and broken down...you basically talking about an online system where you can get access to data if I understand it right here...What is going to be important is that it is used..</p>
X1-102		<p>X-Mhm...(Nodding)</p> <p>M-Will it be hard to sell this to the sales people and make them use it? Especially ones like you said who keeps it all in his head...would that person understand and see the benefit of this?</p>
X1-103	AiO	<p>X-Yeah, probably and it is not because he has a good memory and does not know all the requirements that we have so...So he is probably the only one who knows that he has to share information . So he knows everything and he knows how to share it...so I think it will be harder for</p>

X1-104	<p>the other ones...probably. Once they will know the benefits of it I guess that won't be that hard to sell it to them...</p> <p>M-Well, since you are looking from your point of view I understand that you're looking at that there is not only that they fill it in, they will all be able to access more information to help them in the other end...so there is some return for them...</p> <p>X-Yeah...</p>
X1-105	<p>M-I'd be wary about that control factor thing... they'll feel that the boss wants to see what they do, that's a very sensitive area.</p> <p>X-But he is doing it by now, so that won't be a big change for them...I mean he is checking every week where they are in their business and everything...so not big...</p>
X1-106	<p>M-Psychological...</p> <p>X-Yeah...</p> <p>M-Well I think we are done right now for the questions as far as we go...</p>

Interview: Y1, 22 Nov 2010**Area Coding**

P/G	Profit / Gain
AiO	Acceptance and understanding within the organization
GC	“Go” concession (CBA)
CE	Concession Effect
CA	Corrective action
LS	Legacy System

Index	Area	Transcript
Y1-1		<p>A- What's your official position?</p> <p>Y- Official position... Manager customer support.</p> <p>A- Ok.</p>
Y1-2		<p>Y- And I'm responsible for the customer support department but also for the warehouse, reception and department which designing light-planks(?).</p>
Y1-3		<p>Y- That was an easy question!</p> <p>M- Yeah, we have to settle down, make an easy start on out little process here!</p>
Y1-4		<p>Y- Oh, good!</p> <p>M- And it's always good to know where people fit into the organization when you have this kind of interviews so you understand what your starting point is in the organization.</p> <p>M- We're basically down to five basic questions, with some follow ups and we see where it goes because it's open ended, and our absolutely first question to you is, this is very much from your perspective, how you see it: Why is this system needed in the organization?</p>
Y1-5	P/G	<p>Y- It's needed, first of all, we want to, we have the ambition to be a very important player in the light branch, so we become a multinational instead of only Swedish company, and by realising that I think this system, a general system, which can be used, which has to be used by every separate country should be one and the same. To speak the same language, to have the same issues. And that is why it's very important.</p>
Y1-6	AiO	<p>Y- On the other hand I think that we have to have a state of the art software. Business is changing, changing rapidly and current systems are too old fashioned. They have their limitations and that's why we have to implement a new system.</p>
Y1-7	P/G	<p>Y- And the third reason is what we discussed during lunch: I think we have to have one integrated system. In [Country 2] we have three different systems, running separately. They are linked but the question... it's a matter of time. It involves too much maintenance and there are too many limitations. And we cannot put the information out of it, what we need to do our business good. So that are the main three reasons.</p> <p>M- In your opinion, looking on how you work and so on, what's the biggest benefit for your part of the organization, here in [Country 2] and the stuff that you're doing from the new system?</p>
Y1-8	P/G	<p>Y- Knowing, at any time... what projects are running... and what business will be come in short notice,</p>

		<p>knowing exactly all about our customers... and also the ability to check what happens in other countries, so we can learn from each other. We see from each other what is happening in other countries so we can have the benefits of it.</p> <p>M- When it comes to legacy systems you have three systems today, what are the three different systems you have today?</p>
Y1-9	LS	<p>Y- Today we have your ERP system, the Customics, Customics running finance and order to cash(?). We have also our logistics running in that system. That's one. The second one is our current CRM system. It's a very old system, we bought it, I think 20 years ago... And we are currently changing fields and its very flexible so we can, we can make our own adjustments ourselves... And the third one is our quotation system.</p> <p>M- Ok.</p>
Y1-10	LS	<p>Y- And that's a handmade, thermal quotation system (?).</p> <p>M- Ok, that's a new one to me...</p>
Y1-11	LS	<p>Y- Well, those systems are, the quotation system and the CRM system are linked to each other so we can, we can put name address etcetera, contact persons from the CRM system and transport it to our quotation system, and vice versa. So if we make a quotation we send out the quotation, we can create a link in our CRM system so: this quotation, with this number, was sent to this person, at that time, and with this value.</p> <p>M- How does it connect to the ERP system then?</p>
Y1-12		<p>Y- Not with the ERP system, no.</p> <p>M- Ok, so then, are they basically manually transferred or is it...?</p>
Y1-13	LS	<p>Y- There is a link... because in our Customics there is general data of course, article numbers. We use those article numbers in our quotation system... So we have you know a script, to export data from CUSTOMICS and load it into Central Station, that's our quotation system. And vice versa. That's the only link.</p> <p>M- And that's kind of a batch...?</p>
Y1-14		<p>Y- That's a batch, yes of course.</p> <p>M- So if we look at it from a functional point of view, at the new system when it comes to functionality. I mean not features like pressing a button here and there, more functionality. What would you say are the three most important functions?</p>
Y1-15	AiO	<p>Y- Three pillars... Of course marketing, it should be marketing driven... Relations, so we have to store everything about our customers. And by mentioning marketing you should think about marketing intelligence. And the third pillar should be projects. Our business is done by projects, so we have to follow projects, we have to... and there are several roles of course in projects... so it should also be project driven.</p> <p>M- You run projects with sub-contractors and things like that when you...?</p>
Y1-16	AiO	<p>Y- Yea! Architects, technical advisors, installers...</p> <p>M- Ok. Because I know... when I talked to you colleague she mentioned that they don't really have a project system today to deal very much with projects...</p>
Y1-17		<p>Y- But we have.</p>

Y1-18	AiO	<p>M- But X mentioned it, that it was something they needed. Because they had a hard time keeping track of...</p> <p>Y- Well, that's our business... projects is our business. So that's the most important thing. So there should be a link between relation management but also with marketing intelligence. There are the tree basic pillars of CRM.</p> <p>M- Ok, then we come in to the part where we look at what you're looking at, marketing, relationships and projects and stuff like that, I mean those are your key different functions. You explained also why because they affect each other and they tie in together, of course I mean... without customer you don't have any projects.</p>
Y1-19		<p>Y- Hahaha!</p>
Y1-20		<p>M- The marketing intelligence is like where do I find my customers? Where do I find my projects? Of course it ties together, we can understand that from our point of view. If we're looking at our situation right now, we're looking at coming up to a go/no-go decision, within the corporation.</p> <p>Y- Yea.</p>
Y1-21	GC	<p>M- If the company comes back and says well, they will look at the feedback they get from different parts here in the organization and more or less depending on who they talk to. And then they sit down, and they say well we have, like you said three key things here marketing, relations and projects... And they say well you can only get two of these... well in that case... you can currently today get two of these, which two would you pick? I mean which one would you drop out in that case?</p> <p>Y- None.</p> <p>M- None...?</p>
Y1-22	CE	<p>Y- It would stop for me.</p> <p>M- Ok...</p>
Y1-23	GC	<p>Y- It's not... There's no question about skipping one.</p> <p>M- If that happens... if that happens anyway, you know how things can happen sometimes. Just out of curiosity... Or if there's any kind of misunderstanding so that something doesn't come along on the features...?</p>
Y1-24	CE	<p>Y- Well we have our current systems running and if that will appear I will choose(?) or I will SCARE my boss! Haha!</p> <p>M- You have a nice guy next door here?</p>
Y1-25		<p>Y- He's a very nice guy, yes!</p> <p>M- He's a sales man right?</p>
Y1-26	CA	<p>Y- His a sales man. But I will advise him to, not to implement new ??? (?).</p> <p>M- Because of the effects of lacking functionality?</p>
Y1-27	CE	<p>Y- It will be... it will affect our business too much in [Country 2].</p> <p>M- Well that solved the loop, that's three questions in one basically! Because we are curious about what the effect of things like this are and it's very important to understand that when you talk about how</p>

		decisions are made. Because as we know, depending on how go/no-go decisions are made what it affect.
Y1-28	CE	Y- I think that we in [Country 2] are a little bit further than our colleagues in other countries. We have of course the experience in CRM, we have the experience in our own quotations software... What we today have is running well, but it has its limitations. And I think it's... If there is a go and just two of the tree pillar could be established... then it will not be good for [Country 2]. It will impact our business much. And that's the reason why I always will advise "stop".
		M- When you mentioned projects... what system do you use for projects?
Y1-29		Y- The CRM.
		M-The CRM... the old one?
Y1-30	LS	Y- The old one. In our current CRM we can... we are doing projects, we are doing relation management and we are doing marketing intelligence.
		M- In the ERP you got quotation system...
Y1-31	LS	Y- In the ERP, of course there is a quotation system and that's the reason I'm very curious to see, from X, how they are doing that and how they work with it. Of course that's the most ideal situation... to use our current ERP system also for quotations. Making quotations is just to perform a order...
		M- Yes, exactly... There's no rocket science to that.
Y1-32	AiO	Y- No but of course our market are asking for quotations... readable quotations. With lots of text and descriptions and nice pictures in it. If we can establish that by Customics, well we are fine. Because we see the benefit with working with one and the same system.
		M- Mm... makes sense.
Y1-33	P/G	Y- And it will spare time... it will save us lots of time.
		M- What's your boss looking to get out of this implementation? Same as you?
Y1-34		Y- Same as me. We are on the same level.
		M- Well, that's good. That will help you to understand, from that point of view very much. It's gonna be interesting because you have a very clearly thought out, if this doesn't show up what you are gonna do about it and what you will say.
Y1-35		Y- Yes.
		M- Ok, well you responded to several questions in one there so that simplify things as far as that go... In general how is... If you look at is more... When this stuff and information came out, was it sent out to you directly or was it sent to your boss and he then directed it...
Y1-36		Y- No directly to me.
		M- Directly to you... Reason for that?
Y1-37		Y- Of course in the first phase my... boss was involved. [Boss name] and I are on the same level, we have the same thoughts...
		M- Yea, you agree?
Y1-38		Y- We agree! And that's the reason why I... he put me forward and said Y is directly responsible for all CRM matters.

Y1-39		<p>M- Well putting someone who uses the system into the process is a good thing. Hands on experience! Ok... what did you think about the questions that came out? There came these questionnaires. One... two was skipped I think, so one, three and four came out in the end...</p> <p>Y- One, three and four...</p>
Y1-40		<p>M- What were you thinking when you got the first one and looked at the questions?</p> <p>Y- Emm... I can understand the kind of questions, and I understand why they are asked, but I'm a more practical person. If I was running this project... I put together some key users, some guys from several countries and put them together, have a discussion maybe define scope, define wishes and then start running. I think the way of sending out those questionnaires is... it feels not right... it feels not right... Because when we are discussing right now you can, if you have some gaps or some questions you can ask me for my argumentation. By sending out those questionnaires there's no way drill down... to get more information, what I need...</p>
Y1-41	AiO	<p>M- Do you feel that the questions became more detailed as it went along or did they continue at the same higher basic level so to speak?</p> <p>Y- Emm... higher level... higher level... I found it that it did not affected our market... it was questions in general and not for our branch... not for our business that we're in. So the problem could be that there is a "go" for a system which is not linked to our business, not good enough for our business. And that's the reason why I prefer put guys together. Look them in their eyes, maybe in a couple of days drill down in detail, particular talk about our business and our future. What the system would bring, for the future!</p>
Y1-42		<p>M- When you looked at the questions and you... was your first thoughts that they were asking for an CRM system or...?</p> <p>Y- Yea.</p>
Y1-43	AiO	<p>M- What gave you that indication, apart from the fact that they say we are gonna implement a CRM system?</p> <p>Y- Well, not CRM because... Most of the questions were related to marketing. Especially in the beginning and then I was thinking, it's just marketing that is important. But in our CRM also projects is very important. In all the questionnaires, hardly was spoken about projects. Marketing, relations and management that was the key... So coming back to your question, if you understood it was about CRM, yes of course, but it was only... the focus was in my opinion on marketing aspect.</p>
Y1-44		<p>M- Was there any feeling when you got the first mailing out that there kind of was already a decision on which kind of system...?</p> <p>Y- Yea, yes yes well he told us about CRM Customics I believe. So that was... it was not decided for 100% but he gave us a clue. He gave us an indication. Probably it will be...</p>
Y1-45		<p>M- Because we had an interesting experience, because we read this and my first reaction when we read it and we talked about it, me and Alex was that this is somebody that has already decided what it's going to be.</p> <p>Y- Yea...</p>
Y1-46		<p>M- From an outside point of view I understand. We came without knowing anything, we didn't have any information about what he was looking at or anything. The feeling was that there is a certain way that has been looked at here, at least as the model for...</p> <p>Y- Yes, that's true, that's true. I agree, I agree.</p>

		M- So we had that discussion and that's how, what originated some of the questions on this because we got curious, so we brought it up at the university and said we read this and this is what we see but we are not sure this is the way it is.
Y1-47	AiO	Y- It was not, I think it was not 100% decided but it was... because he told us also in the feedback one: "regarding software, our original plan was to utilise Customics CRM. However it seems Microsoft will make this obsolete in 2010 for the new Customics 5 which will be released in 2011 and has a much better compatibility with our wish list"... do we have a wish list? ..."and uses the number of customizations necessary"... our wish list... and our customizations...?
Y1-48	AiO	Y- Do we have a wish list?... No, I have a wish list. Do we have customizations? Well it's just a pre-study so why customization in this stage? M- Well like I told you before, we didn't read too much of that on beforehand because we didn't want...
Y1-49	AiO	Y- Well this is the proof that there is a thought to implement Customics of course. And I think it's good because Customics is running so of course you have to take in thought Customics CRM... of course... If there is an integration possible then it can offer lots of benefits. M- It can save a lot of integration issues, with transferring data and formatting and so on...
Y1-50		Y- Of course. M- Ok, good. Well you've answered very well on everything here basically, to our questions to a large extent... so do we have anything that we need more in-depth on at this stage here? What do you put into marketing intelligence when you say that? Is it knowledge about competition and market shares and...?
Y1-51	P/G	Y- Data mining. M- Data mining...
Y1-52	P/G	Y- Yepp, Data mining, competition... sending out e-mail, letters, news letters... M- You do a lot of mailing? Stuff like that?
Y1-53	AiO	Y- It is the future of course... In the [Country 2] the customers are not waiting for printouts. Everything has to be sent out by e-mail... so we are doing that too. M- How many people are you here now in [Country 2]?
Y1-54		Y- In [Country 2]? Almost 40, almost 40...In sales marketing of course... we have eight people in the field. Twelve in customer support... In marketing two women... some light designers, warehouse guys... so almost 40. M- The field people are they working from the field office here or home or?
Y1-55		Y- I hope they work in the field!.. M- Hahaha!
Y1-56	AiO	Y- ...As much as possible... No, they have their own desk here, so they can come over here and put their laptop in the docking station and work, but of course they have to be outside... M- Because I was talking to X and she said they had five salespeople in the whole of [Country 1], so they worked from home very much and had their home offices and so on.
Y1-57	AiO	Y- Yea, they have also their home offices but [Country 1] is seven, eight times bigger than [Country 2]... but we do have a lot of traffic jams of course...

Y1-58	P/G AiO	<p>M- So the key benefits that you see from this system here is that it will be better integrated, everything will basically be one solution...</p> <p>Y- One solution, one company! Lots of time savings... knowing exactly what happens... in projects, with our customers, and there should of course be a kind of workflow management situation... so letting each other know what the status of some projects is, order status and contracts... internally, externally...</p> <p>M- Well, I basically run out of questions.</p> <p>A- Have we everything clear on the three main functions? Explained more or?</p> <p>M- Well I did a little bit of explaining there... customer relations, marketing intelligence, data mining, mailing etc etc... relations is customer information.. and means not only address and so on...</p>
Y1-59	AiO	<p>Y- No, it's also contact person but also criteria by contact person, what are their hobbies, what kind of information does he like... what competitors are important to him... what is his position... that kind of things, but also when our people are visiting the customer and they have to make minutes all those minutes should be stored beneath those relations. We have to build up our kind of archive.</p> <p>M- What are the timelines of the projects? Does it differ a lot?</p>
Y1-60	AiO	<p>Y- Well, some hospitals for example can run for five years. From plan, development till closing the project it can take five six seven years. Most projects... will run for more than one year, between one and two years.</p> <p>M- Ok, so that means timelines and schedules and...</p>
Y1-61	AiO	<p>Y- Timelines, schedules, work planning, resource planning... to establish problem solving, of course.</p> <p>M- You have customer support, what's included in that, from your side?</p>
Y1-62	AiO	<p>Y- Customer support, it's the commercial guys, the guys that take the telephone... There is a group of people that are dedicated to the order entry... Customer support is also the warehouse. So there are three disciplines... the commercial guys, order entry and warehouse.</p> <p>M- So the warehouse is specific for [Country 2], or are you covering a bigger area?</p>
Y1-63	AiO	<p>Y- Well we thought that [Country 2] were the only sales office with its own warehouse... but...</p> <p>M- Haha, another side-effect of this little project...</p>
Y1-64		<p>Y- Well maybe it's my problem because I've only been working for [The Company] for six months... maybe it's a lack of my knowledge.</p> <p>[...]</p> <p>M- If there is a go... would you be looking into... maybe if there is, one of these three steps are not fully there where you want it... would you do something to get that implemented locally for your organization?</p>
Y1-65	CA	<p>Y- Always. Always. Because I think those three pillars are main and they are key for CRM, good CRM. And that's the reason why I for [Country 2] would implement that... always... whether the group says no or yes.</p> <p>M- Ok. Good! Thank you very much Y!</p> <p>A- Thank you very much!</p>

Y1-66		[...] Y- This is good! It's very positive! It gives me a good feeling. It's a kind of cooperation and it's a way to get something for [The Company] worldwide and not for [The Company] locally. And that's good. That's very good.
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Interview: Z1, 1 Dec 2010**Area Coding**

P/G	Profit / Gain
AiO	Acceptance and understanding within the organization
GC	“Go” concession (CBA)
CE	Concession Effect
CA	Corrective action
LS	Legacy System

Index	Area	Transcript
Z1-1	P/G	<p>M- Den första frågan vi har här som är ganska viktig... ur ditt perspektiv då, varför behövs det här systemet?</p> <p>Z- Effektivitet det tror jag är... det tror jag ligger väldigt högt upp. Effektivitet att, så att vi kan bli effektiva och hinna med mer och framförallt kan fånga fler order, fler uppdrag.</p> <p>M- Vad är största fördelen med ett sånt här system som du ser det?</p>
Z1-2	P/G	<p>Z- Tillgång till information och att man bygger information och kan lämna det vidare till andra som också jobbar med samma kund, samma projekt, samma situation... och som stödare i processer, att man får till gång gemensamt till information.</p> <p>M- Vad har ni för system idag?</p>
Z1-3	LS	<p>Z- Lite varierande från land till land. Ska jag vara riktigt uppriktig så tycker jag [Country 3] belysning, svenska ???(?) har i princip ingenting. Vi har ett program som heter ***** som är för minidatormiljö... gjort för 10-15 år sen av ***** i *****. Lite hemma snickrat... Jag skulle säga att det är ett kvalificerat adressregister, där man också kan klassificera kunder men ingenting knyter ihop det till andra projekt eller annat. Vi kan inte ens lagra e-mailadresser i det om vi inte bygger på själva med nya fält och sånt där... Kvalificerat adressregister där man kan hålla ordning på vem som fått katalog och annat. Och kan också följa kampanjer manuellt(?)... Mycket gammalt.</p> <p>M- Så det interagerar inte med något annat system som ni har?</p>
Z1-4	LS	<p>Z- Nä, ingenting... Det fanns väl lite idéer då på att kunna hämta årsomsättning och sådär, men det är... ingen värdefull information. Men det var [Country 3] där, sen har vi ska vi säga exemplen... [Country 4]-kontoret och [Country 2] är goda exempel där man genomfört det här och drivit det väldigt långt och har väldigt stor nytta av det.</p> <p>M- Mmm.</p>
Z1-5		<p>Z- Med andra system då.</p> <p>M- Ok. Om vi tittar på det... Vilka är det som du ser som nyckelaktörer, nyckelanvändarna, dom personerna som du tror får största... spinoff på det här, som är verkligen key i det här projektet eller sammanhanget?</p>
Z1-6	AiO P/G	<p>Z- Ja... säljare i lite vidare bemärkelse, alltså utesäljare och innesäljare. Så både och... det kan bli en rätt rejäl hävstång i att få en innesäljare att kunna agera betydligt effektivare och kunna göra mer... och att man samverkar på ett helt annat sätt med utesäljaren... åt båda hållen naturligtvis. Man vet vad so har hänt, om man som säljare ska besöka kund så... kan ju se det från det, den kunden, vad har han presterat tidigare osv. vilka offerter har vi ute och vilka projekt är han aktiv på... vilka anbud har vi. Så kan han gå in i en affärshandling direkt med det underlag man ska ha... Det behöver inte ligga på CRM, man kan ju koppla upp information mot CRM:et och enkelt få reda på då ju, hur lönsam är den kunden för oss?, är</p>

	LS	<p>han lönsam på speciella produkter?, eller speciella projekt eller... Så kan han ju besitta den kunskapen. I [Country 3] idag så hanterar vi vår omsättning som i stort sett en enda variabel på säljarnivå... man får upp nån nivå innan man börjar prata mer lönsamhet... börja på för verktyg(?). Vi har precis bytt affärssystem och det blir ju ett steg framåt, från att tidigare ha haft ett hemmasnickrat som... har stött oss väldigt bra men från mitten av 80-talet... Stött oss väldigt bra men om vi velat ha någon typ av analys, säg jag vill titta på mina största 100 kunder, vad köper dom och sådär... då får man gå ner till IT-avdelningen o få en query skriven och körd...så att det... Nu har vi fått verktyg så att vi kan jobba med sånt själva.</p> <p>M- Det nya systemet, vilket är det? Är det...?</p>
Z1-7	LS	<p>Z- Customics... och sen har vi byggt upp en BI-portal där då med andra programvaror så vi kan... Vi har data warehouseing av alla data så vi jobbar egentligen inte i affärssystemet utan dom körs över varje natt så kan vi själva göra vår analys i den data mängden... på ett enkelt sätt tycker jag.</p> <p>M- Du nämnde, vi pratade lite om vad som är key functions och sådär, och du sa det är informations delning och tillgång till information, om jag förstod dig rätt. Informations access... Vad har du mer som är så där riktigt nyckel... punkt i dom här sammanhangen?</p>
Z1-8	P/G	<p>Z- Ja alltså det är ju... stödja och bli en förutsättning för olika typer av samarbeten då... Ett exempel jag nämnde då var ju innesäljare, utesäljare som kan jobba på ett helt annat sätt... Och vi har ju den relationen kund och säljare som kan bli betydigt mer professionell, om vi vet vad vi håller på med. Då vet vi vilka offerter som är ute... kan samarbeta mer långsiktigt med kunder, vi vet vad vi tjänar pengar på osv... man kan välja bort saker... och välja till. Det är en konst det också! Faktiskt.</p> <p>M- Någoting som dyker upp... jag förstår att ni kör projekt en hel del också. I större sammanhang i en del länder... det har nämnts...</p>
Z1-9		<p>Z- Var nämndes det...? I [Country 2] eller?</p> <p>M- Ja, bland annat...</p>
Z1-10	LS	<p>Z- Ja vi har ju... en... Customics den implementeringen har vi ju rullat ut land för land. Och med lite olika omfattning... I [Country 2] är det en större omfattning, så dom har haft det lite jobbigt med det.</p> <p>M- Dom nämnde också att dom kunde ha projekt hos kunder och sådär... det nämndes att dom ibland hade större kundprojekt som sjukhus eller sådana storprojekt...</p>
Z1-11		<p>Z- Jaja, jojo, precis.</p> <p>M- Det påpekades att det kunde vara väldigt väsentligt att kunna sköta det på ett bra sätt...</p>
Z1-12		<p>Z- Jo... jag vet inte hur pass mycket ni har satt er in i... släng hit en penna där borta och sudden lite längre upp... vi kan ta o titta lite på...</p> <p>M- Kommer mitt favorit instrument, whiteboarden!</p>
Z1-13		<p>Z- Så länge jag slipper powerpoint är det bra!</p>
Z1-14	AiO	<p>Z- Jo, vi har en byggherre, BH skriver jag då... Investerare då, han vill bygga ett hus. Sen finns det väldigt många olika typer av entreprenad men han kan ju gå till en generalentreprenör... och säg bygg det här huset åt mig, jag behöver ha 200 kvadratmeter, det ska uppfylla alla fodringar... och det får han. Det blir en totallösning... Men den kassiska vägen är då att här anlitas det då en arkitekt... och sen går det vidare så att det involveras en el-konsult... och sen går det vidare, det involveras en installatör... Och sen blir det et hus så småningom och då menar jag... här behöver vi in och vad pratar man om, man pratar om ergonomi, totalkostnad för ägarskapet, energikostnad, livscykelanalys och sånt där...</p>
Z1-15	AiO	<p>Z- Arkitekten här där blir det kanske mer att vi pratar lite mer design... För arkitekten han tycker att den</p>

		<p>där, den gillar jag... Arkitekten ger den broschyren till en el-konsult som ritat in så alla ledningarna i huset och skriver då [The Company] nummer 1234 eller likvärdig... och så går det då till en installatör: bygg det här huset och så ser han att här står det [The Company] och då frågar han oss om en offert. Så offererar vi och ser till att knipa det och så levererar vi... Så att redan här har vi fyra intressenter, på ett projekt. Så det är ju en intressant... att titta på ett projekt... vilka intressenter finns eller titta på en el-konsult, vilka olika projekt är han knuten till... Sen finns det lite mer data vi gärna vilja ha in i ett sånt här CRM och som nog blir lite olika från land till land och det är att automatisera en del av datan, vi har ju mycket bygg ???(?) upplysningar som vi köper in. Och det, alltså detalldata... bygglov är utfärdat för en tomt där och där och företaget ***** ska bygga en försäljningslokal för att reparera cyklar ungefär va. Och sen lite senare kommer det då att byggare utsedd, arkitekt utsedd... och det är ju värdefullt... sånt vill man ju gärna knyta in i ett CRM-system så att man får det live där. Annars är det ju att, man sitter o skriver in det själv, registrerar det då...</p>
Z1-16	AiO	<p>M- Jobbar ni mycket med... jag förstår eftersom ni finns på så många ställen nu i världen, blir större o större och sådär... internationella kunder och sånt, hur hanteras det i dagsläget?</p> <p>Z- Ja, jag kan säga det att den sidan jag jobbar med har inte så mycket av det. Jag jobbar mer med det vi kallar professionell belysning dvs. skolor, kontor, liknande... Det finns en del riktigt stora installatörer som jobbar i fler länder men man jobbar ändå nationellt. Vi har stora byggartyper, typ ***** , som är jättekund till oss i [Country 4]... nu har dom ***** sjukhuset men dom agerar ju inte som koncern utan det är den svenska organizationen som är igång här va... Däremot, ni har träffat W antar jag...</p>
Z1-17	AiO	<p>M- Ja!</p> <p>Z- Där är det mycket, mycket relevant, alltså där man har pan-europeiska butikskedjor som kanske gör en upphandling... dom gör upphandling kanske i [Country 4]... För 150 butiker över hela Europa. Och det ska upphandlas centralt eller dom kanske säger att det ska upphandlas lokalt av installatörer men att dom här priserna gäller. Då är det mycket att hålla reda på. Då blir det nått sånt här riktigt stort va. Det kanske finns en expansion(?) manager centralt på huvudkontoret men det finns förmodligen lite sånt här centralt också... sen kan det hända att det här och det här finns lokalt i vartenda land men för att hålla igång 150 projekt, kanske inte samtidigt men... Och styra kontaktfördet och se till att man inte har störningar här ute som kokar uppåt i kedjan. Så den som sitter som riktig key key account manager för den här utvullningen i Europa, den vill ju ha rätt mycket information nedifrån, både positivt och negativt för att kunna styra pris och annat. Och jag menar en sån utvullning den blir så komplex så man klarar inte av och hålla ordning på det med papper och penna och pärmar och papper.</p>
Z1-18		<p>M- När du nämner det här... Ramavtal arbetar ni med det över huvud taget?</p> <p>Z- Mjaa...</p> <p>M- ... som har storkunder och sånt där?</p>
Z1-19	AiO	<p>Z- ...men oftast på nationell basis. Men det spelar ingen roll det. Vi har ju stora installatörer, alltså storinstallatörer som är rikstäckande i [Country 3] och kanske finns på 25 orter, där vi tecknar centralt avtal men agerar lokalt... kommun för kommun eller län för län... men innanför det ramavtalet... det stödjer ett CRM-system väldigt fint.</p>
Z1-20	AiO	<p>M- Okej, vi tittade lite på dom här tre olika nyckelpunkterna, och vi kunde hitta flera stycken andra också som var jätteintressanta, det var jättebra för det är ju så att det hänger ju ihop... men sen kan det ju va så att man kanske prioriterar vissa delar högre än andra... bara för att det är vässäntligare så att säga...</p> <p>Z- Men då har vi ju två så långt... det ena var ju det här utesäljare, innesäljare, kund, att få en bra informationsdelning och samarbete där... det är en... Sen har vi det här när pan-erupeiska eller många... du använde ordet ramavtal med väldigt många lokala aktörer, blir ju omöjligt att greppa över om man inte har ett verktyg.</p> <p>M- Nä just det... Sen nämnde du säljstöd generellt också... det hänger ju lite ihop med informationstillgång och sånt där...</p>

Z1-21	AiO	<p>Z- Den nuddar också in till... något annat, vad skulle vi kunna kalla det... dokumenthantering. I [Country 2] har man ju, man kallar väl sitt system data centralen eller något sådant...? Stämmer det?</p> <p>M- Ja...</p>
Z1-22		<p>Z- Då kan man ju säga att...</p> <p>M- Dokumenthantering är ju lite annorlunda...</p>
Z1-23	AiO	<p>Z- Ja det är det men det känns som dom använder det lite grand som... dom har ju sina intressenter men... det blir ju en offert... det kanske inte bara blir en utan det blir 1,2... det blir många, det är data beräkningar av belysningen... det blir ju oerhört många filer, ritningar med mer... Och det är klart, det är ju oftast knutet då till... först el-konsulten med olika förslag men också till installatören... och ofta använder man någon typ av dokumenthantering... Gå in på den installatören leta upp det projektet och så vill man då kunna hitta alla data som ligger, vilket avger effektivitet då.</p>
Z1-24		<p>Z- [Country 2] har det definitivt på det sättet.</p> <p>M- En av våra funderingar kring det här som vi tittar lite grand på det är ju, vad som händer... ofta när det är såna här situationer, man förhandlar och man ska ta fram ett system, det är ju många intressenter egentligen... det finns ju många divisioner och grupper och avdelningar osv. inom det här. Då är det ju så att ibland får man ju ge och ta i dom här sammanhangen för att lite grand få ett beslut, för att man ska få Go. Och när vi bad att få tala med folk så ville vi ha folk som är positiva till det här, som lixom tyckte att det här var benefical , alltså positivt för verksamheten... Om det kommer i en situation... och vi har ju lite sådana nyckelpunkter här... om det kommer i en situation där man sitter såhär: okej vi har alla dom här funktionerna som vi vill ha, men vi kan inte ta alla dom här funktionerna... och så säger man att nån eller några av dom här funktionerna måste vi plocka bort i den här fasen så att säga för att få ett Go-beslut, för att gå vidare med det här så att säga, som du sa det är snart Go/no-go här... vi sitter ju nästan på knappen idag.</p>
Z1-25	GC	<p>Z- Det kan också vara klokt många gånger att börja med det lilla och bygga upp. Det är väldigt många människor som ska in i det här och lära sig... och det är nytt och det är komplext...</p> <p>M- Ja, vi har förstått att det finns mycket frågetecken... En av våra funderingar kring det här då, om har då i ditt fall ett par sådana här grundfunktioner som man tycker är väsentliga att dom finns, om någon av dom här... man säger att man måste plocka bort en av dom här... vi kan inte ha den här dokumenthanteringsbiten så att vi kan dela på det här viset t ex. Eller att man säger: vad gäller det här med access till informationen så måste vi i utgångsläget göra det ganska begränsat, lokalt t ex. Om du blev tvungen att ge efter på någon av dom här punkterna, vad skulle det innebära för dig i det här sammanhanget? Skulle du vara villig att förhandla om det eller skulle du säga, nej det är inte förhandlingsbart, så att säga?</p>
Z1-26	GC	<p>Z- Jaa, men det kan ju också vara som så att man tar saker i steg två eller tre (finns det såna planer? är det tanken?), bara man vet att det här kan vi ta senare... så man inte utesluter den funktionaliteten om man nu inte har tid, eller pengar, vad det nu beror på att vi vill vänta...</p> <p>M- Om man tar t ex den här dokumentbiten som du tog upp här som vi diskuterade lite kring, om vi säger att den blev borförhandlad i steg ett så att säga... vad skulle effekten bli av det, rent praktiskt?</p>
Z1-27		<p>Z- ... Den... offerterna skapas ju då i ett annat system och går att söka där...</p> <p>M- Men då finns inte kopplingen i dagsläget till...</p>
Z1-28	LS AiO	<p>Z- Näe, utan då går man in och söker på två ställen va... Man tappar ju den charmen att: jag ska besöka den kunden, jag vill se alla hans projekt där vi är aktiva så vi kan förhandla om dom. Men... alltså dokument hanteringen kan ju bli väldigt stor, det finns ju mer än detta och det kan ju va så att, folk som får leva farligt i steg ett då.</p>

Z1-29		<p>M- Dokumenthantering... jag har jobbat på ***** faktiskt i sex år, då dokumenthanteringssystem o sånt då det kan bli väldigt stort men har man ett bra system så kan det bli väldigt effektivt...</p> <p>Z- Det pågår alltså ett arbete som håller på att titta på dokumenthanteringssystem i företag och det är ett sånt här effektivitets höjande sak, det finns ju data överallt och... i takt med IT-utvecklingen så finns det också grejer överallt och man knappt vet... det är inte lätt att hitta allt menar jag.</p> <p>M- Näe.</p>
Z1-30		<p>Z- Utan det finns gamla o nya versioner av allt och sådant...</p> <p>M- Så från ditt perspektiv så är det såhär att, om nån sån här funktion tas bort så är det något man då tar och sätter på sparlåga till nästa fas så att säga?</p>
Z1-31	CE	<p>Z- Man rullar ut det i steg ja.</p> <p>M- Vad skulle du i en sån situation... du känner ju...</p>
Z1-32	AiO CE	<p>Z- Intressenterna det måste vi ju ha med klart... Sen är det ju frågan vad vi sen knyter till dom, och andra saker typ kampanjer och utskick och aktiviteter, det är ju såna man knyter till dom här grupperna va. Också vem som var på sista kundträffen eller seminarium, så det är väl det... Intressenter, aktiviteter... det är ju i vid bemärkelse då. Aktiviteter jag tänker att det kan vara allt från seminarium till kundbesök till liknande... Jag funderar lite grand på vad vi har i andra... andra system här... Intressenter, aktiviteter, där har vi ju så att säga förutsättningarna för senare omsättning och intjänande... kommer ju in sen på offerter och liknande och då är vi ju väldigt nära vår intjäning va så att det tycker jag inte man ska släppa på, men dom länkarna är ju så himla enkla så dom, offerter o så det finns i ett annat system... så det är bara att knyta ihop det.</p> <p>M- När ni offererar... ja just det så offererar du till installatören då ja, så det är den som gör beställningen på det material som ska ut slutligen till BH:n där borta.</p>
Z1-33		<p>Z- Ja, vi har ju... för att vara europeiska så har vi ju en helt unik affärsmodell, sälja direkt till utföraren... Det finns ju normalt en grossist emellan här... det är så man gör normalt...</p> <p>M- Men hur mycket arbetar ni, kommer ni i kontakt i dagsläget med arkitekten och el-konsulten och så någonting? Är det när projektet börjar eller?</p>
Z1-34		<p>Z- Nja, lite olika från land till land då. I [Country 3] där vi har en väldigt gammal tradition med marknadsledare, där läggs en stor del av arbetet, läggs in på... jag ska inte kalla det förebyggande under håll men: det bolaget där eller de bolagen dom får garanterat 2-3-4 besök per år med kvalificerad information oavsett om det är ett intressant projekt eller inte för oss... så kan man ju bygga... I dom flesta andra länder så jobbar man ju så att: den konsulten har ett jobb som verkar jätkligt intressant för oss, och då går man på det. Man följer pengarna mer... Men jag skulle säga att det här är kärnan för oss och ju mer mogna marknader kommer långt och stor del av bearbetningen ligger på el-konsulter.</p> <p>M- Ok.</p>
Z1-35		<p>Z- Tar vi fallet [Country 2] där den lite större delen ligger mot installatör men visst jobbar man mot dom också. Arkitekter kan stå för en 10-15 procent.</p> <p>M- Jag tänkte på det du sa där med dokument och sånt där, det finns ju liksom tekniska ritningar och beskrivningar och såna där saker...</p>
Z1-36		<p>Z- Ja, just det.</p> <p>M- Får ni något material elektroniskt idag då eller får ni det skickat, som pappersform...?</p>

Z1-37		<p>Z- Ja, vi får mycket digitalt och det är lite olika långt i olika länder. [Country 2] tror jag ligger på 97 procent digitalt... ritningar ut/in. Och dom har börjat i tid då i och med att om du visar att du kan det, då får du också digitalt material... Finns ingen av våra kunder som sitter och ritar för hand på något idag... Är vi inte med på noterna så blir det att kunden får printa ut och skicka till oss med post då och det är ju...</p> <p>M- Det har inte han lust med!</p>
Z1-38		<p>Z- Näe, precis... Man tänker på telefaxen som står där... det är inte så många år sen man inte fick glömma att fylla på papper fredagen...</p> <p>M- Ja, så inte den gick över helgen nä!</p>
Z1-39		<p>Z- Nu är det knappt att det kommer något alls...</p> <p>[...]</p> <p>M- Hur många olika system har ni?</p>
Z1-40	LS	<p>Z- Det finns väldigt mycket... men säg då ett CRM, det kan man säga det har vi ett men det är inget kritiskt system, det är för gammalt och dåligt... i [Country 3]. I [Country 2] där är det mycket mer, det är riktigt bra, det har ni säkert tittat på. Men sen har vi ett affärssystem där vi tar in, vi sköter våra offerter vi tar in våra uppdrag, lägger order och inväntar svar då: när kan det här tillverkas och sen så ligger det då och talar med andra system. Och sen har vi då för verkstadsplanering... material- och provisions-system. Det är ju helt egna, men dom håller ju också på då, vi ska ju byta ut allting innan nästa år är slut. Det blir nästa svettiga övning...</p> <p>M- Oj, ja det är tuffa tidsramar på det där...</p>
Z1-41	LS AiO	<p>Z- Ja... Med det system vi har idag så jobbar dom mot fasta ledtider och antaganden av att plåt kommer in på 3 veckor osv. men dom kommer jobba då mer i reella termer mot verklig hastighet och...</p> <p>M- Men då måste det kopplas mot leverantörer sånt då..?</p>
Z1-42	LS AiO	<p>Z- Ja, det gör det. Och framförallt vi måste koppla upp så att vi går upp mot det här systemet då och kontrollerar verklig kapacitet, verklig lagring. Inte att man, som vi gör idag så har man fasta ledtider på tre veckor eller fyra eller två eller någonting beroende på vad det är för något det gäller. Det gör... det stämmer ju för det mesta...</p> <p>M- Men när det inte gör det då?</p>
Z1-43		<p>Z- Inte när det krisar...</p> <p>M- Då får man ingen chans till framförhållning egentligen...</p>
Z1-44		<p>Z- Nej.</p> <p>M- Ok. Så ni ska titta på ett dokumenthanteringssystem, CRM-system och verkstadsplaneringen...</p>
Z1-45		<p>Z- Ja... Sen har vi ett stort online-projekt med hela internetvärlden som ska igång nästa år... så det är appar och allting. Vi ska ju ha våran katalog där också.</p> <p>A- Mhmm!</p> <p>M- Online-system säger du, är det för kunder att kunna accessa...?</p>
Z1-46		<p>Z- Internet! Ja...</p> <p>M- Det är dom som ligger dig varmt om hjärtat med tanke på din roll i verksamheten...</p>

Z1-47	AiO	<p>Z- Vi gör ju oerhört mycket där men tekniken ger nya möjligheter.</p> <p>M- Du svarar väldigt bra på frågorna så, det är så konkret det är så klart så... Hur länge har du varit involverad i det här projektet med W så att säga då? Har du varit med från början då? Initierades det här via W eller? Det här CRM-projektet eller kom det...?</p>
Z1-48	AiO	<p>Z- Njæ... Vi har nog pratat om det i tio år... Ja, tio år och... företag växer väldigt snabbt... och det blir... alltså både nationellt och internationellt, bara det här med ett litet självbolag i [Country 4] med en chef och fyra medarbetare... det klarar man av med en pärm och lite klisterflikar va, men helt plötsligt är dom 20 personer...</p> <p>M- Då går inte det längre...</p>
Z1-49	AiO	<p>Z- ...man har försäljningschef och sådär... det går inte längre va...och internationellt blir det fler o fler bolag och man kräver den här typen av system och i vissa fall så har vi då internationella affärer som går över många länder... där skulle det också underlätta.</p> <p>M- Ni har en hel del egen produktion också... i [Country 5] och sådär...</p>
Z1-50		<p>Z- Ja.</p> <p>M- ... det kommer in under det här verkstadsplaneringsystemet då eller?</p>
Z1-51		<p>Z- Nä, det ska jag inte säga...</p> <p>M- Nä...</p>
Z1-52		<p>Z- Vi har ju hållit på i [Country 5] nu i flera år och det är ju mer en tillämpad filosofi, hur man kan tillverka i land så långt borta, och så måste man titta på vad vi är riktigt bra på också, det är viktigt och det är inte den här massmarknaden utan det är... projekt, intressanta projekt som är, dom kan vara riktigt stora men oftast kan det vara lite anpassningar och annat. Och en annan del av marknaden som vi är, där kunderna är intresserade av oss det är god service: dom kan ringa från Oslo klockan tre och vi är där på plats imorgon... Det är riktigt bra. Och så funderar man då på [Country 5]... åtta till tio veckor från dörr till dörr... hur kombinerar man det? Så vi är ju intresserade av verksamhet i [Country 5] på grund av att det är en kostnadsbild som är intressant... så vi har ju använt dom i många år för att tillverka komponenter och så... Men då är det ju färdiga armaturer och då får man tänka lite annorlunda...</p>
Z1-53		<p>Z- Nästan hela vårt sortiment är påverkat av kundkrav: jag vill ha den, precis som den är MEN!... Måla den grå eller en längre sladd eller nånting och då fungerar ju inte det här...</p> <p>A- Näe...</p>
Z1-54		<p>Z- Så vi är väl inne på att det vi tillverkar i [Country 5] det gör vi också här, och då lägger man den här basvolymen som får ticka och gå bara... säg vi behöver 10 000 av den här varje månad och då gör vi kanske 6 000 från [Country 5] och täcker upp det andra här hemma och fångar då i den delen upp lite fluktration där man vill ha lite andra utseenden.</p> <p>M- Då kan ni balansera...</p>
Z1-55		<p>Z- Så att dom då får lugn o ro och bara kan pumpa på samma variant utan störningar.</p> <p>A- Mmm.</p> <p>M- Det här systemet som man tittat på lite grand, hur... med mer eller mindre globalverksamhet som det är idag... det kommer köras helt på engelska då antar jag? Eller? Har ni diskuterat det?</p>
Z1-56	AiO	<p>Z- Näe, det har vi väl egentligen inte gjort... nej det har vi inte gjort utan vi ser det nog som självklart idag</p>

		att vi kör det på engelska. Affärssystemet Customics då, den kör vi ju på engelska... Beskrivningar av produkter och offerter och sådär, det blir ju på lokalspråk.
Z1-57	AiO	<p>M- Hur... Du har ju varit runt här ju lite inom organizationen och så... var tror du största så att säga motståndet mot en sån här sak kan infinna sig? I vilket led... är det försäljningen eller är det marknad eller vilken del kan ha störst resistance emot att acceptera ett sånt här system skulle du tro?</p> <p>Z- Ja... det är svårt att säga, jag upplever nog att väldigt många ropar på CRM utan att egentligen fatta vad det kommer innebära. Utan det är någon funktionalitet som man kan göra något med, men det är få som fattar vilket jobb det är, speciellt inledningsvis att jobba på ett nytt sätt.</p> <p>M- Tror du det är stor diskrepans mellan olika personers uppfattningar om funktionaliteten? Om vilka funktioner som ska finnas med?</p>
Z1-58	AiO	<p>Z- Ja, alltså du får ju lagra väldigt mycket information om du ska ha tillgång till någon information... jag tror nog att många kommer uppleva att: väldigt vad mycket tid det här kommer ta. Men... den tiden tar det ju inte idag i och med att vi inte loggar det, inte lagrar det. Men alltså har vi ju inte tillgång till den informationen. Den sitter ju i huvudet på en... på nån... men den sitter ju inte hos kollegan, så det är ju självklart att det tar mera tid... Så det tror jag väl är en sak... en annan sak är ju att det här är ju inte speciellt användbart innan du... alltså... du får hålla på och lagra i ett år innan du får upp volymen på det hela, och att du möter behovet med data då... Alltså första veckan har vi ju ingen användning för det, vi har ju ingenting lagrat, utan det bygger ju upp efterhand det här...</p> <p>M- Ja, pay-offen kommer ju över tid så att säga...</p>
Z1-59	AiO	<p>Z- Ja! Alltså när du har hållit på o kört i ett år, då håller du på att göra affärer här, på det som är lagrat här. Och det är då man inser värdet av det hela, så motivation där tror jag blir viktigt! ... Jag tror många vill ha det här, många inser inte vad det är, det blir mycket jobb i början som sagt var... lagra mer än vad man är van vid.</p>
Z1-60	AiO	<p>Z- Jag ser lite grand till online-projektet vi håller på att jobba med... och även när vi införde affärssystemet att... man kanske inte har lagt nog notis i våra processer. Man tar in ett nytt affärssystem och kanske anpassar för mycket till det tidigare, utan istället se på våra processer, hur ska vi jobba och sen ta ett intressant verktyg...</p> <p>M- Ser du någon risk i samband med den här processen att det nya systemet bestämmer processen snarare än er affärsverksamhet?</p>
Z1-61	AiO	<p>Z- Nej, jag tror att man ska titta på våra processer först och det kan man börja på innan vi har det här systemet på plats... Hur vill vi att man ska jobba? Hur vill vi jobba? Och sen tar man hjälp av ett modernt system.</p> <p>M- Ni gjorde ju en sån här ISO- certifiering och det har ju med processer bland annat att göra och dokumentation och sånt... Det här är ju en följdfråga lite grand på det du sa...</p>
Z1-62		<p>Z- Bra exempel.</p> <p>M- ... uppdateras det?</p>
Z1-63		<p>Z- Ja det gör det ju, vi har ju fått det men det tyckte jag var ett jättebra exempel för den certifieringen... jag tror det var i slutet 90-talet nånting... vi hade kört igenom det här på ett halvår eller nånting och hade lite konsult hjälp också... och det tog betydligt längre tid för att när vi skulle börja på att dokumentera våra processer... Vi hittade ju så jädra mycket dumt, så det blev ju mer ett arbete med att förändra våra processer än ett ISO-jobb va, så det hade ju sin avsikt va men... Vi är på väg över i mer processororienterat arbetssätt men... till hälften pratar vi om det och till hälften gör vi det. Så vi på väg åt rätt håll.</p> <p>M- Nä för processerna det är ju bara egentligen en dokumentation om hur man faktiskt arbetar.</p>

Z1-64	AiO	<p>Z- Ja, och det här det gör ju inte jobbet åt oss va... det är det många som hoppas...</p> <p>M- Om man tittar på det såhär... man gör ju alltid cost-benefit analys, CBA som man säger i den engelskspråkiga litteraturen... Vad ser du payoff-tiden på det här? Du var redan inne på att det kommer ta ett tag innan det här... betalar tillbaka sig.</p>
Z1-65	AiO	<p>Z- Jo... I och med att det är ett ofyllt system... ett år det är väl fyllnadstiden så att säga, men sen så kan man säga... Första projektet kan man ju börja jobba med, ungefär som att skissa hellder(?) och det kommer ge en annan effektivitet och en bättre hit-rate med att få den här ordererna va. Men sen har det väl också... en annan sak man kan koppla på, nu har vi ju pratat projekt... om vi kryper under skinnet på kund lie grand så... dom här el-konsulterna går säkert att dela upp, och vi kan dels titta på då hur... vilka som kommer till våra olika evenemang... och sen kan man ta sig en fundering, av de som kom, vilka ville vi ha dit?... Man bygger upp en målbild: dom här vill vi umgås med för att vi tycker dels att det är lite foger fränt (?) och/eller det finns en bra potential där va. Jag menar den typen av fiske är ju jävligt intressant att göra med ett sånt här system: Här, här har vi vårt mål i år va...</p>
Z1-66	AiO P/G	<p>Z- Annat vi börjar jobba med typ mål kostnad (?) som vi börjat prata med våra säljare om... av de här 200 el-konsulterna så vill vi plocka fram 10 stycken som har högsta prioritet för nästa år och få in lite key account... tänkande och väldigt klar målsättning för nästa år kring de här 10 kunderna och sen, kvartalsvis kanske viss omvärdering och när det kommit igenom, bort med den in med en ny va... Det tror jag är en enorm upp-sida om man kombinerar med det här.</p> <p>M- ... Det sitter ju ett antal personer och ska fatta det här go/no-go beslutet.. jag vet inte vilka det är som är inblandade men däremot hur tror du dom ser på det här, om man tittar på det här med cost-benefit-analysen? Hur långt tidsperspektiv tror du dom tittar på när dom ser på en sån här investering? Det är ju väldigt viktigt när man ska fatta beslutet...</p>
Z1-67	GC	<p>Z- Ja... nä, jag vet inte... vet inte om... alltså W blir ju tvingad att redovisa något sånt antar jag...</p> <p>M- Ja, han nämnde det vid vårt första möte.</p>
Z1-68	GC	<p>Z- ... Så att det är nästan vad vi än håller på med idag, så är det den typen av analys som VD:n kräver.</p> <p>M- Vårt första bekymmer när vi såg det här, det sa jag till W, det första jag sa att det känns som att det är väldigt kort tidsram för att göra den här förstudien och få klart för sig lixom, vad de olika intressenterna och deras funktioner, vad dom är intresserade av och vad det omfattar... Så sa han att: du är inte den första som säger det... Nu är det ju bokslut snart också så...</p>
Z1-69	GC	<p>Z- Ja, jo... Jag blev ju ställd inför det med online-projektet... vi fick stopp i det på grund av VD-byte för ett år sen då, men nu är vi inne i budgeten igen. Men jag får ju frågan från VD då: vad kan få business sales på det här?</p> <p>M- Ja.</p>
Z1-70	GC	<p>Z- Då får man ju börja jobba på, vad är en ny kund värd... och det är ju en jävla svår fråga va... men jag vet vad den är värd... en ny kund är värd 51 000 kr per år va, i ett väldigt stort snitt va. Det är inte så jävla mycket... men det kan bli många med hjälp av internet!</p> <p>M- Ja!</p>
Z1-71	GC	<p>Z- Och det kanske går att utveckla till en högra nivå?... Men det är svårt... vad är benefits av det här? ... Och det är väl rätt jobb ni håller på med då, att försöka hjälpa oss att förstå... var är, vad är de goda sidorna av det här? För det kan vara som så, bland många lite grand: go to hell, det är klart vi ska ha ett CRM! Alla moderna företag har ett CRM... men vad ska vi ha det till?</p> <p>M- Ja det är därför vi frågar efter funktionerna, nyckelfunktioner... för vi bryr oss inte så mycket om vad label:en är så att säga. Du kan kalla det CRM, du kan kalla det beslutsstödsystem vilket iofs normalt är tekniskt två olika saker... det här är ju ett stödsystem...</p>

Z1-72		<p>Z- Vi kan gå tillbaks igen då så ser vi för att det här... man kan säga något väldigt snabbt va men sen när man pratats vid efter ett tag så funderar man över hur pass väl överlagt det var... vad var det vi sa i början? Jag pratade om... vi kunde fånga ihop... samla in...</p> <p>M- Ja, information, dela information... med intressenterna...</p>
Z1-73	GC	<p>Z- Ja, intressenterna, aktiviteter kring nått som har med våra affärer att göra t ex byggprojekt... eller det kan vara kundträffar, eller liknande för att kundbesök för att sälla fram då: vilka kan ge oss affärer och vilka ska vi inte intressera oss för... Det blir en effektivitets sida där... det känns väl bra tycker jag...</p>
Z1-74	GC AiO	<p>Z- Sen var vi inne på det här med dokumenthantering och så... då känns det kanske som man är lite i yttre kanten... samtidigt så, jag skulle... bli väldigt glad om jag såg... en av våra säljare kvällen innan, dom loggar på och tar fram: den där ska jag besöka idag, och får en lista: dom här projekten har vi offererat till honom... och jag tror att den där den ligger i röret, alltså kan jag trycka på knappen och få ut lite mer information om dom projekten va... och för att få veta lite mer om den här kunden, lönsamhet och annat... kanske jättebra att ha...</p> <p>M- Jag såg på din sida också... du pratade om el-konsulterna, i flera sammanhang har du tagit upp dom här att kunna spjälka och sortera dom olika underleverantörerna och kunderna... alla intressenterna i det här skedet för att kunna optimera lite hur man arbetar... Men det kräver ju att dom har informationen... annars går det ju inte att göra...</p>
Z1-75		<p>Z- ...Sen är det ju olika på olika marknader men... [Country 3], alltså vi pratar om tusentals kunder av varje sort på grund av att marknaden är inte så stor men... vi är marknadsledande, vi är ju överallt!... Att jämföra med [Country 4] eller [Country 6] eller något, jag menar: [The Company]-who? ... så börjar man först med att kanske ordna lite kundträffar... man börjar sälla bland dom här som är någonting att ha... Intressenter, aktiviteter... kunna jobba samman inne- utesäljare, det tycker jag är en stor kraft.</p> <p>M- Att man har samma information och samma kunskap om kunder så att...</p>
Z1-76		<p>Z- Ja.</p> <p>M- ...så att det blir seamless som det heter på engelska...</p>
Z1-77	AiO P/G	<p>Z- Och det blir en väldigt behaglig situation för en kund också att... tillslut ringer en kund hellre så småningom till en innesäljare som alltid finns på plats, har tillgång till alla redskap, datasystem och annat... och när den personen dessutom vet precis vad som är sagt innan då... Sånt kan bli riktigt bra!</p> <p>M- Vad har ni för dimentionering på inne- vs utesäljare? Om man tittar på, personalmässigt sätt...</p>
Z1-78		<p>Z- Ja... dom är väl nästan 1:1 eller 1:2... något sådant två ute på en inne... eller 1:1... 35 personer här på andra sidan gatan som jobbar för marknad [Country 3]... från inne... så jag undrar om det inte är i princip 1:1 om man räknar med alla...</p> <p>M- Ja det är många personer involverade i en kundprocess så att säga... Det ska ju finnas någon de kan nå när de behöver... snabbt få information och sånt där...</p>
Z1-79		<p>Z- Mmm.</p> <p>M- Har ni någon form av supportverksamhet för kunder som har problem eller issues eller sådär eller går det via försäljaren då i dom här sammanhangen? Eller är det ytterligare nån gruppering som kan... Som en sorts supportfunktion så att säga... att dom håller på med något och så finns det ett problem. Går det då till... säljaren som är ansvarig... eller hamnar det hos någon annan gruppering?</p>
Z1-80	AiO	<p>Z- Jaa... nä, alltså... i huvudsak säljaren eller innesäljaren men det finns ett supportsystem för när det går fel. Då har vi en reklambesväravdelning då och dom... Kanske att utsäljaren är med på något sätt, men dom jobbar direkt mot installatör... men det är ju klart att det är ju väldigt bra för den utsäljaren att veta vad</p>

		<p>som har hänt där.</p> <p>M- Ja, precis...</p>
Z1-81	AiO	<p>Z- Så det är rätt, det finns fler... fler aktörer... vad kan det finnas mer... Det finns fler direkta aktörer sen ska vi fundera på... andra flöden in då med leads eller prospectives leads då... och det har jag jobbat en del med då och... om vi nu ska bygga om hemsidan... ett av dom största syftena det är ju att generera fler leads... till en säljorganization men då ska det också hamna på rätt ställe...</p> <p>[...]</p>
Z1-82	AiO	<p>Z- Så, leads och prospective leads skulle man få in i systemet...</p> <p>M- Det hörde vi från någon av de andra intervjuerna, med just leads- och prospecthanteringen att kunna hitta ett sätt att kunna knyta ihop det så att säga, och följa det... följa processen...</p>
Z1-83	AiO	<p>Z- Det är precis ja, dom är högintressanta men de är ju inte värda ett skit innan vi gör något med det va.</p> <p>M- Näe. Ett visitkort är fortfarande bara en bit papper med telefonnummer och ett namn på. Det är när du ringt och etablerat kontakten som det börjar bli något kanske...</p>
Z1-84	AiO	<p>Z- Ja... sen i vissa av våra aktiviteter så sitter vi mitt emot varan, säljare och ny kund. Då kan man ju kontrollera situationen lite och se vad som håller på att bli fel och rätta till det... men många som sitter via webben eller skickar med post... där har man ingen kontroll över situationen... Man vet ingenting egentligen. Och det är klart om man då responderar på något sänt, så är det ju värt väldigt mycket om vi gör någonting.</p> <p>M- Okej...</p> <p>A- Ska vi ta något om dom... questionairen?</p> <p>M- Ja det kan vi göra, just det.</p> <p>M- Du har svarat på... Dom här frågeformulären gick ju ut från W. Du har svarat på dom?</p>
Z1-85		<p>Z- Jag tror jag har svarat... kanske inte allra sista...</p> <p>M- Nä jag tror det stod ett, två sen hoppande han trean för det... eller nä tvåan var det, för det var lite samma frågor där, lite överlappning konstaterade han...</p>
Z1-86		<p>Z- Jag tror att sista... tror jag inte jag har svarat på för att jag har inte hunnit för jag har varit ute och rest med W, så det är...</p> <p>M- Haha, självförfållat!</p>
Z1-87		<p>Z- ... sen så var ju engelskan på sån nivå så att... jag har levt sista 30 åren med engelska som affärsspråk men... den var för svår...</p> <p>M- Det var för mycket åt det tekniska hållet?...</p>
Z1-88		<p>Z- Nej, det var det inte men det var lite svårt att greppa vad han var ute efter...</p> <p>M- Vad var din uppfattning om frågeställningarna som sådant?</p>
Z1-89		<p>Z- ... Många bra... men flera lite svåra.</p> <p>M- Mmm, var det svårt på det sättet att det var svårt att förstå innebörden av frågorna eller mer svårt att veta...</p>

Z1-90		<p>Z- Du har dom inte med dig?</p> <p>M- Nej, jag har dom inte på mig såhär i dagsläget... som jag sa innan det är medvetet... Vi har tittat på dom breifly så att säga, alltså på själva frågeställningarna...</p>
Z1-91		<p>Z- Några... nu får jag tänka tillbaks, det var länge sen jag gjorde det... Några var lite... kunde vara lite svåra att förstå...</p> <p>M- Kändes det... din uppfattning när du frågorna... kändes dom ledande på så sätt att det är redan bestämt hur och vad som ska göras?</p>
Z1-92		<p>Z- Nej...</p> <p>M- Eller det kändes ganska öppet?</p>
Z1-93		<p>Z- Ja. Och jag tror W kom med väldigt snabbt och bra feedback på de svar som kommit in från andra: det här verkar vara uppfattningarna si och så...</p> <p>M- Det är ju bra.</p>
Z1-94	AiO	<p>Z- Sen var det något... jag reagerade för... mer för att jag inte hade tänkt på det sättet riktigt... det var lite grand vilket gränssitt CRM skulle stödja och var det låg i processen framåt... bakåt... Och den tror jag tog satts nästan ända från tillverkare till fakturering...</p> <p>M- Var det den här kedjan eller...?</p>
Z1-95		<p>Z- Ja, jag ser den inte riktigt framför mig men... Men det var en sak jag var lite frågande... för att tänka att ett CRM skulle kunna jobba så djupt om man ville.</p> <p>M- Ja just det. Det finns ju som du själv vet, det är ju en affärsprocess som börjar som jag brukar säga "Från tanke till dollar"... så att det bli pengar i andra ändan</p>
Z1-96		<p>Z- Ja, jo!</p> <p>M- Ofta är det med såna här system att dom försöker spjälka den här kedjan för att... men det blir ju ofta overlap med så att säga, var börjar det och var slutar systemet i förhållande till...</p>
Z1-97		<p>Z- "Från tanke till dollar", det var ett bra uttryck!</p> <p>M- Ja jag har det som min egen lilla filosofi... Jag har blivit ombedd att skriva en bok om det en dag, men vi får väl se om jag får så mycket erfarenhet att man vågar göra det... Men det är faktiskt... det är det verksamhet handlar om, i slutändan och... där är det ju så att det sätts in olika system på olika delar... Var ska CRM:et vara och var passar det? Och som du nämnde innan: Alla vill ha ett CRM... men vad ska det lösa? Vilken del av processen ska det hantera... och där verkar det vara lite mer oklart över... olika uppfattningar om man säger så.</p>
Z1-98		<p>Z- Naa, alltså jag tycker att frågeställningen var inte fel... det var bara jag blev lite förvånad själv: jaha, kan det vara CRM-system som går så djupt åt både det och det hållet.</p> <p>M- Nä, det är ju också viktigt när man implementerar, då tittar vi ju på funktioner igen... något som ligger ända här nere och ända här uppe. Vad kan vi ta med? Det finns ju inte ett system som löser allt...</p>
Z1-99	GC	<p>Z- Nej, och sen finns det sannolikt väldigt stora system och det finns små... och även om vi skulle gå på det största vilket kanske är klokt att börja med gränssnitt fem nånstans (?) så kan man utvidga det senare...</p> <p>M- Har du någon mer fråga? Jag har fått svar på dom grundläggande frågorna...</p>

Z1-100		<p>A- Ja, nä, det var det jag sa innan...</p> <p>Z- Ska vi göra en sammanställning?</p> <p>M- Ja det kommer en sen! Men får vi skriva en sammanfattning bara så att vi är överens såhär långt iaf, så det vi kommit fram till så var det: informationsaccessen som var viktig va... det här med att stödja samarbetet. Jag tror det är viktigt som du säger också att systemet fylls... att det kommer bli en av dom stora trösklarna här... så att folk börjar använda systemet, fylla det med information, så att det bli värdefullt i slutändan. Och sen har vi, som du sa själv när du fick frågan: hur mycket tar systemet in? Alltså hur mycket kan det ta in av den här hela processen?</p>
Z1-101		<p>M- Du har gett oss en bra inblick i hur du ni tänker och arbetar här och det är faktiskt väldigt roligt för oss att ha del i.</p> <p>Z- Och då kan man säga historiskt att... jag har varit inom denna grupp i 25 år och 5-10 år i en annan grupp som var lite mindre va, sen köptes vi upp och det är ju väldigt välgjort allt det vi gör här i ordets positiva bemärkelse men det får ibland effekten att vi är lite för noggranna och tänker lite för stort och få med allt för annat... det blir lite jobbigt... att gå igenom...</p> <p>M- Ja, jo jag förstår vad du menar... det kan vara ett dilemma i dom här sammanhangen... definitivt.</p>

Interview: X2, 10 Dec 2010**Area Coding**

P/G	Profit / Gain
AiO	Acceptance and understanding within the organization
GC	“Go” concession (CBA)
CE	Concession Effect
CA	Corrective action
LS	Legacy System

Index	Area	Transcription
		[...]
X2-1		<p>X- So what is this about today?</p> <p>M- Well, today is a little bit follow up about what we talked about last time... we go through basically same areas, we have some follow up questions, you know things that came out of the interviews last time that we would like a little bit to verify or see how you think about it and so on... We don't expect it to be a very long interview this time... it's more about like things that showed up and we want to have... a little more feedback on it. Changes, new things, things that may have happened and so on...</p>
X2-2		<p>X- Ok.</p> <p>M- When you said... you said something about the timeline, that you were not aware... You thought that you'd already be started with the implementation, or?</p>
X2-3	GC	<p>X- Yea, well we, when we say the schedule we thought that this were the pre-study of the study and then that we would implement the CRM... and ... so it was quite a surprise.</p> <p>M- Ok, well I was... What we have been trying to find out a little about how the information goes, and we have talked to W a little how things are progressing so we are waiting to see what happens... when there's a decision and how it's communicated, because that would be interesting for us... to understand.</p>
X2-4		<p>X- Yea.</p> <p>M- Ok... but like you said, you don't have any information about a decision being taken currently anyway as far as I understood from when we talked a little a few minutes ago...?</p>
X2-5		<p>X- No.</p> <p>M- I know that W has been busy but... Have you had any more feedback on the information you have given W? Because you asked... you responded to the fourth...</p>
X2-6		<p>X- No.</p> <p>M- Ok... So looking at this... You said you talked to your boss about the functionality, and he said he didn't wanted anything taken away?... Is that right?</p>
X2-7		<p>X- Yea!</p> <p>M- What would his reaction have been in case something was taken away when the decision was made? What do you think he would do then?</p>

X2-8	CE	<p>X- ... It's hard to answer for him because when I said that I would take out the "search by criteria" he said "No I want that!" so... it's just very hard to answer for him. I know that on the fourth point I gave you... they are all very important so I really don't know what he would do.</p> <p>M- No... With this system now and what's implemented... how does the decision on what functions go in? Do you know... have any idea if that's a decision by you or your boss or... is it done from W and his people? ... to put it frankly.</p>
X2-9	GC	<p>X- Yeah... I think Ws is everything and then he will ask if it is ok and... say these are the functions we require.</p> <p>M- Yea, ok.</p>
X2-10		<p>X- So.. I am not the decision person...</p> <p>M- But you do have an influence on what the decision is going to be from your organization's point of view.</p>
X2-11		<p>X- Yea, yea we should...</p> <p>M- We talked briefly, but never went into any depth about it... Who do you see are the key users for the system while it's implemented? Who are going to be the key people who are, for whom this system is very important or are very important for the system? Not only to put information in but to use is in general... I mean...</p>
X2-12	AiO	<p>X- Well, I guess everyone will use it. I mean it has information regarding prospects and customer and everything. Everyone at this point will have take the information so I guess everyone will use it, but the key users might be either the sales representatives, as they are at the beginning of everything or their personal assistant.</p> <p>M- Ok...</p>
X2-13	AiO	<p>X- At the present time in the company... most people will use the Customics with quotations and everything, it is only the customer department ... at the present time...</p> <p>M- Ok.</p>
X2-14	AiO	<p>X- ...but maybe later on that will change...</p> <p>M- It will expand into more branches of the... organization?</p>
X2-15		<p>X- Yea.</p> <p>M- When it comes to this project here and so on... who have you been... this project with CRM... who have you been communicating with and cooperating with within the organization? Your boss you said...?</p>
X2-16		<p>X- Yea!</p> <p>M- What's his role?</p>
X2-17		<p>X- It's just... everything... so he has every commercial comshen (?)... so that's why... well he's leading the commercial team so... thats why he wants to have a look on CRM and he wants to know how it will work.</p> <p>M- Who else have you been involved with and talked to in this?</p>
X2-18		<p>X- [Financial manager's name]. She's the financial manager... Because she was at the beginning of the project as well for Customics, when we implemented it, so... we are three: [Financial manager's name] and my boss and me.</p>

X2-19		<p>M- Ok, that's the project team that you have! Ok, excellent. So what's your thoughts on the project today? What do you think today about it?</p> <p>X- Well I can't tell you where they...</p> <p>M- Ok, are your thoughts on the project today? At the current status, knowing what you know and so on... I mean what do you think about time-line and functions and... I understood that you were concerned that it would take more time now?</p> <p>[...]</p>
X2-20	GC AiO	<p>X- ... Well what we thought was that, the quicker the better for us but... we are working with else by now. But we have come to a point where CRM is really, really important because we can't keep walking this way and just losing information... But we are not so sure that the CRM that is in Customics will be the best one for us.</p> <p>M- Ok.</p>
X2-21		<p>X- That's what we are afraid of.</p> <p>M- So... those... you have concerns about the Customics system itself or... that it won't fulfil your requirements or functionality that you need...or...?</p>
X2-22	P/G AiO	<p>X- At the moment we don't know what's in the CRM in Customics. So we are not so sure that it will fulfil or not what we need... I think we don't have so much choice because everything is in Customics by now so... That would be better if we had something that is from the beginning to the end the same software.</p> <p>M- Ok.</p>
X2-23		<p>X- See what I mean?</p> <p>M- Yep. Definitely!</p> <p>[...]</p> <p>M- No, I think based on what we had actually that is basically what we... need currently. So we should be done now. Thank you very much!</p>

Interview: Y2, 10 Dec 2010**Area Coding**

P/G	Profit / Gain
AiO	Acceptance and understanding within the organization
GC	“Go” concession (CBA)
CE	Concession Effect
CA	Corrective action
LS	Legacy System

Index	Area	Transcription
Y2-1		<p>M- We don't know... it will probably be a little shorter today than last time...</p> <p>Y- Ok.</p> <p>M- ... since it's mostly follow up questions on what we did last time. Se where things are and how things are progressing... or not depending on what the situation is.</p>
Y2-2		<p>Y- Ok, ok.</p> <p>M- So... after our last meeting... did any new questions show up for you that you brought up with people? No?</p>
Y2-3		<p>Y- No.</p> <p>M- Have you heard anything about the project since we met last time?</p>
Y2-4		<p>Y- Nothing!</p> <p>M- Not a beep? Nothing, no decision, nothing?</p>
Y2-5		<p>Y- Nothing! So tell me... what is happening over there?</p> <p>M- Actually I understand that W has been very busy traveling... together with Z among others, doing follow ups and so on... I've been trying to get some feedback from him about what's going on and he hasn't given me anything that we really can work from right now. He wants the feed-back of course from, in general from our... what we will find and our findings as soon as we're finished with this.</p> <p>M- This will be our last interview, because we have to finalize this during next week, for the first draft has to be ready and presented to the university and after that they will tell us how to progress and what we need to fix and so on so...</p>
Y2-6		<p>Y- Ok.</p> <p>M- As much as we would have liked to continue with this project I think we will have to take a break from here.</p>
Y2-7		<p>Y- All right, yep...</p> <p>M- Anyway. What we are doing today is, like I said... we have a few extra questions that came up based on our transcripts and when we listened to the interviews from last time, so it will be 20 minutes maybe half an hour at the most depending on what's up.</p>

Y2-8		<p>Y- I have time, I have time!</p> <p>M- Yes, we really appreciate it. We really enjoy it! Thanks ones again for the last visit we were down there we'd really enjoyed it. It was fun and we enjoyed meeting you and X very much. It was very pleasant.</p>
Y2-9		<p>Y- It was nice meeting X too, yea!</p> <p>[...]</p> <p>M- Anyway, one of the questions that you already answered, which is whether you have any feedback on any go/no-go decision being made. As far as I understand you haven't heard anything and no project info or anything about how things are going...</p>
Y2-10		<p>Y- Is there a go?</p> <p>M- No, not that we know. What are your feelings about that things haven't progressed?</p>
Y2-11	GC	<p>Y- ... That's not good! ... No, I'm aware of the fact that the decision will be made at the end of this year. So... having that in mind... I'm ok, I'm ok. So at the end of this year I expect a go or no-go. In the meantime I have nothing heard.</p> <p>M- Ok, if there is a no-go-decision, what would you do then?</p>
Y2-12	GC	<p>Y- Nothing...</p> <p>M- You continue as things are? Because you have your system that you could use or?</p>
Y2-13	CE	<p>Y- We have our system... if there's a no-go it's a little disappointing...</p> <p>M- Yea. I can understand.</p>
Y2-14	CE	<p>Y- But we are ok, we are running ok. But if there is a no-go I think I will make a phone call to W. And I will try to present to have a new system implemented in the coming years.</p> <p>M- Yes, I can see that. Definitely. When we looked at the system and the functionality of the system... we talked about that last time... Who actually decides what functionality is going to be in the system?</p>
Y2-15		<p>Y- In [Country 2]?</p> <p>M- Yes.</p>
Y2-16	GC	<p>Y- I do... I do, together with... I have a small project team over here in [Country 2]... Myself, two sales persons and one person from the marketing department... And three of us will decide what will be in the system or what's not.</p> <p>M- Ok. What is your boss's involvement in this? I know you work close with him. You told us that last time, you have a very close working relationship there. What's his involvement a this stage? What does he think about the decision if there is a go or no-go?</p>
Y2-17	AiO	<p>Y- The same as I, I tell you. He... think that we have to operate, we have to work with one and the same system. Huge benefit, and also for [The Company] worldwide it's ok. If there is a no-go... I think we can live with it, and my boss thinks that too, but we have to argument... we have to discuss this with W.</p> <p>M- Yea.</p>
Y2-18	AiO	<p>Y- Because to be complete we have to work with one and the same system.</p>

Y2-19		<p>M- When we look at this, one thing that showed up last time which we discussed a little bit briefly and X mentioned it too... From your point of view, who are the key users for the system, I mean who will be using this system actively and you see as key users for this system?</p> <p>Y- In [Country 2]?</p> <p>M- Yes.</p>
Y2-20	AiO	<p>Y- Everyone will use the system. Everyone, everybody... Key user will be me, and the marketing members.</p> <p>M- Ok. I understand that... You said that you had a team of three people with roles in the project. Are you working as a project manager, kind of, internally now on this, from your side, from [Country 2]?</p>
Y2-21		<p>Y- Yep.</p> <p>M- Ok. Well, the other persons, what exactly are they bringing to the team then? What's their role in the team?</p>
Y2-22	AiO	<p>Y- Well... previously, some months ago, we sat together and we defined wishes and... how do you call them...</p> <p>M- Functions?...</p>
Y2-23	AiO	<p>Y- Functionalities, what must be in the system and we... put everything on paper. That's one and secondly... Everything I discuss with you, with W... I communicate with them, and I ask them what they think about it. And the three first questionnaires... the answers were defined not only by me but also by them.</p> <p>M- Ok.</p>
Y2-24		<p>Y- We did it together.</p> <p>M- Yea. That's a very good approach because I can see that there's a difference between the different countries that we have talked to and how they have approached and dealt with this, as far as delegation and management of the project. You are sitting in [Country 2] now, but do you think that from a global perspective, do think that the implementation as such will have a huge impact on streamlining processes or...</p>
Y2-25	P/G	<p>Y- No, no... Not at all because... the way we are working now... is ok... but it can be much easier and be smoother and by implementing a new system, a integrated system... I think the processes will become... clearer... So we have to describe the process of course. But I think we can... make efficiency... We can do some efficiency, yea, we can... it can be more effective.</p> <p>M- So you see the system as a tool to make the current processes better, improve how they work?</p>
Y2-26	P/G	<p>Y- Absolutely!</p> <p>M- Ok. Just so we understand each other. Excellent!</p> <p>[...]</p> <p>M- Because a lot of people have a tendency to see technology as a solution to everything rather trying to look at what we need to solve... Ok. Are you looking to, for other things... The CRM will do certain things. Are you looking also at what other parts of the business could be automated or improved by systems like this?... Or do you expect the CRM to cover most of your needs together with the current system?</p>
Y2-27	AiO	<p>Y- I think so.</p>

Y2-28	<p>M- Ok.</p> <p>[...]</p> <p>M- I like your quick and good answers. It makes it so easy for us!</p> <p>Y- You said 20 minutes!</p> <p>M- Yea, at the most! You never know... I mean we have a pretty good idea and since you haven't received more feedback and information there is no new information for us to dig into. So it's more follow up and see... you know how do you look at certain things and based on what we got, the organization the project... we got that... so that was important to understand. And what you will do if there's a no-go decision is also very important. So I think we're basically done, from our point of view!</p>
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