

# Cross-Functional Team Collaboration for Custom Salesforce CRM Implementation

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## ABSTRACT

Implementation of a customer relationship management (CRM) system helps in taking proper actions to improve customer satisfaction and increase the overall efficiency of business operations by prioritizing solicited feedback of potential customers and employees of different departments. Additionally, CRM systems facilitate keeping indispensable information of the customers and revolutionize customer service by implementing effective strategies and interacting with the customers.

**Keywords:** CRM, Salesforce, Cross-Functional Team, Team Collaboration, Customer Satisfaction.

## 1. INTRODUCTION

In the evolving business dynamics leveraging robust customer relationship management (CRM) has been highly prioritized in different organizational settings with a view to enhancing sales performance and keeping consistency towards improving customer loyalty. In the organizational process, inconsistent CRM processes encounter various.

Difficulties that badly impact the overall sales operations. Therefore, inconsistency in the customer relationship management process ultimately leads to reduced conversion rates and missed opportunities in the competitive business environment. However, conversion rates in the streamlined business operations of different companies can be significantly increased with proper customization of salesforce CRM implementation. This current study has critically emphasized broader aspects of the significance of cross-functional team collaboration in the context of customizing salesforce solutions.

## 2. BACKGROUND

In general, CRM systems play a crucial role in facilitating effective management processes by incorporating the customers, evaluating data, and analyzing sales processes.

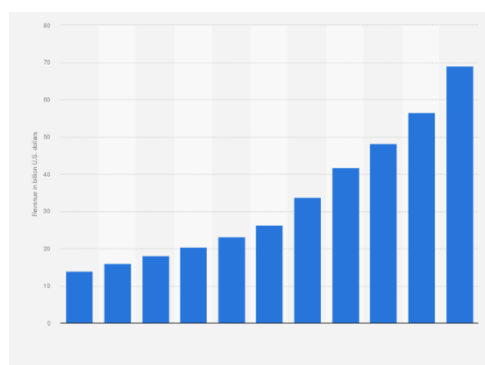
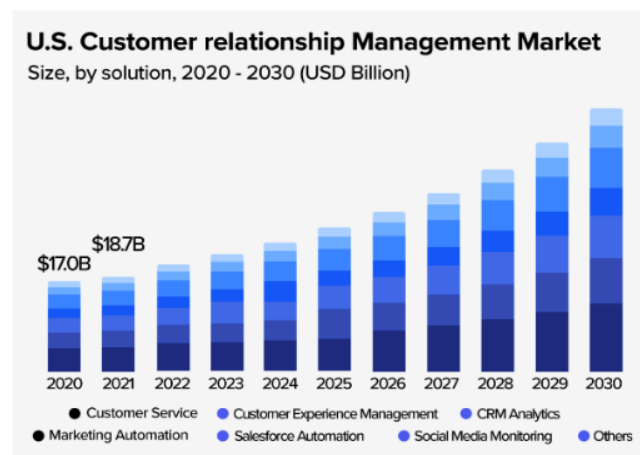


Figure 1: CRM software revenue worldwide 2010-2020 [14]

It can be pinpointed from the above figure that the revenue generation of the Customer Relationship management software across the globe would reach around US\$90 billion in the upcoming years. It has been forecasted of a steady growth and reach milestone of US\$145.60 by the end of the calendar year 2029. In many cases, it is the utilization of disparate systems within organizational settings that particularly generates inhibition in creating a culture of effective communication, learning, and sharing of knowledge and data. Disparate system is referred to as effective and advanced software applications which are particularly utilized in the various healthcare settings for recognizing risk factors and implement data security. In addition, inconsistent CRM systems intercept organizational efficiency for the silo mentality of the workforce in the workplace that ultimately badly impact sales opportunities as resistance to change attitude misguides employees that lead to misaligned goals of the organizations.



**Figure 2: Market size of CRM in the USA [13]**

It can be elucidated that a holistic view of the changing preferences and needs of the customers can be received from the solicited feedback of the customers, and effective interactions with the customers produce fragmented data of the potential customers and it reduces conversion rates. Data fragmentation is treated as daunting and costly issues that develops misclassification errors. The Salesforce report disclosed that 73% of clients have experienced increasing sales by understanding the unique needs and changing expectations of potential customers [7]. It can be underscored from these statistics that embracing CRM systems in the customization of the sales force can significantly work to identify the cap of customer engagement and implement unique strategies to bridge customer management approaches.

### 3. PROBLEM STATEMENT

Effectiveness in the overall performance of an organization is particularly hindered by inconsistent customer relationship management processes. Mostly a varying system and methodologies are utilized by different departments that particularly generate fragmentation in data and it ultimately creates issues in making effective decisions towards enhancing competitiveness in the market. In many cases, fragmented data that is tracked by one department is entirely

One of the leading organizations Unilever has strong market presence in the global markets of more than 190 countries. It has been reported this leading organization has encountered CRM implementation issues due to different regulatory framework in different countries where this leading organization is operating [9]. Many time difficulties also developed related to the CRM implementation revolves around managing effective connection with the diverse customers due to their changing preferences and evolving market dynamics. Different from the collected data of another department. Therefore, many discrepancies are seen

in all collected customer data that lead to misaligned goals of the organizations [10].

In addition, inconsistency in CRM systems within organizational settings not only generates issues to receive accuracy of data but also develops communication gaps between different departments. Particularly communication gaps between frontline employees and customers develop significant issues to gather proper insights of the customers as it is many times overlooked by the employees and develop scope of decreasing conversion rates. Moreover, compliance issues can also persist with inconsistent CRM processes in streamlining business operations. Generally different departments of a particular organization hinge on a distinct regulatory framework.

#### 4. ANALYSIS

##### a. *Significance of leveraging cross-functional collaboration*

In the organizational process, it has been highly important to ensure effective collaboration of different departments for adopting customer relationship management systems for providing excellent and unique support systems to diverse customers. Particularly each department within organizational settings can convey unique insights into the changing needs of the customers [2]. Therefore, incorporating a cross-functional team in the workplace can significantly help in receiving a comprehensive understanding of the unique preferences of the customers. Ultimately combined viewpoints and shared data of different departments can produce better outcomes in the customization process.

For instance, a renowned brand Coca-Cola witnessed increasing sales by implementing customized Salesforce CRM implementation in their streamlined business operations. This initiative allowed this well-known brand to understand the changing needs of its potential customers and increase confession rates by enhancing collaboration between various departments [5]. The statement of Ulrik Nehammer, CEO of Coca-Cola Germany “We literally have billions of transactions a day on Salesforce. And everything is connected, collaborative, and mobile.” reveals the uniqueness of implementing a CRM system in the entire business operations in the evolving business landscape [8].



**Figure 3: Advantages of CRM implementation [12]**

##### B. Issues of inconsistent CRM

Therefore, inconsistent CRM processes within organizational settings can promote risk factors and legal penalties. Mostly leveraging customer relationship management systems in the workplace requires standardized processes otherwise it can develop administrative burden before the workforce [1]. Therefore, an ineffective business approach to implementing standardized processes into the workplace can increase employee frustration and damage the morale of the employees. Many organizations have not fully focused on optimized business processes as long-term planning and strategic decisions are highly required for analyzing overall performance driven by the CRM system.

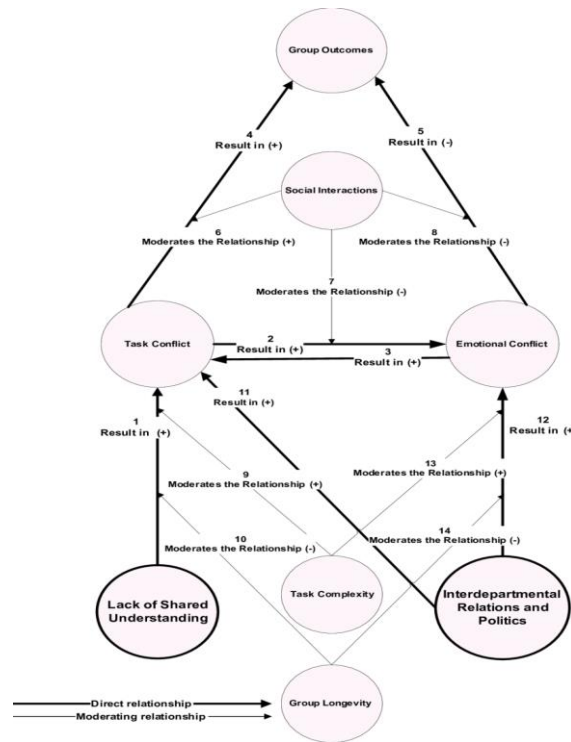


Figure 4: Challenges to implement CRM [4]

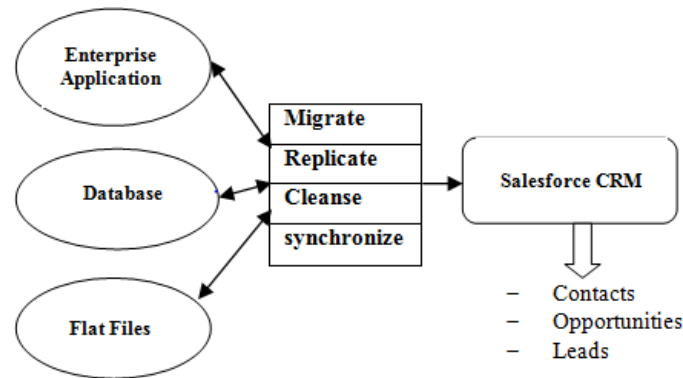
Many times accountability of the owners is remains unclear before staff members in the organizational settings. Additionally, resource management system can also be more time consuming and workers from various functional areas are resistance to change that significantly create hindrance in organizational progress and success.

**5. METHODOLOGY**

Firstly, it is highly important to evaluate the specific requirements of different departments that can help to introduce data-gathering processes in the context of successfully adopting the Salesforce CRM process into the organizational settings. Besides incremental improvements can be seen to embrace customized CRM systems in alignment with the agile development approach. Even introducing the process of gathering real-time feedback from the employees of different departments can significantly work to refine the functionalities of the CRM system. Fundamentally, customization of the change management system can be effectively applied and its advantages can also be received by providing effective training to the employees. In many cases, employees are resistant to change due to the lack of hands-on training support to them [6]. Therefore, effective utilization of the CRM system in the streamline business operations can be possible and smoother transitions in the change management system can be seen with consistent support through training stations.

Besides, effective feedback mechanisms in the workplace can be a crucial part of evaluating pre-implementation and post-implementation changes in the business operation. In this regard, a culture of continuous learning, sharing knowledge, and adopting a change management system needs to be developed in the workplace for the successful implementation of CRM systems in the organizational process [3].

For instance, one of the leading organizations Dell Technologies has initiated a solicited feedback-gathering process in order to make improvements in their integrated sales force CRM system [9]. This initiative has become a part of ongoing enhancements in terms of competitiveness in the market and increasing conversion rates.



**Figure 5: Strategies to embrace CRM [11]**

## 6. CONCLUSION

To conclude, the implementation of the Salesforce customer relationship management system that streamlines business operations enables companies to connect with their clients and incorporate between different departments. However, house implementation of the Salesforce customer relationship management system severally relies on internal resources and the skill set of the employees. Generally, it is highly important to have a custom with the salesforce components otherwise lack of experience of the employees cannot provide unexpected results to the company. Particularly resistance to change, and lack of resources develop inconsistency in CRM implementation. In this process, two main aspects including testing and implementation of solicited feedback from the employees need to be focused on understanding the requirements of the organizations and developing effective resolutions in the context of embracing the Salesforce CRM system in the organization settings.

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